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ABSTRACT

This document, which was developed on the basis of recent research and testimony of small business owners, managers and employees, and training providers, is a basic practical manual for those owners and managers of British small and medium-sized enterprises (SMEs) who want to initiate or improve staff training and development activities. The following are among the topics discussed in the first nine sections: the changing workplace; employers and training (training differentials between part-time and full-time workers, male and female workers, and small and larger firms); obstacles to providing training; the business case for training (benefits of work force training); technical and key (basic) skill needs; training approaches and strategies (appropriate forms of training, key workers as coaches or mentors, recognition of on-the-job training, time constraints, open and distance learning, women-only training, Investors in People, employee development schemes, training costs, collaborative arrangements, accreditation of training, evaluation of training); ways of motivating employees to participate in training; examples of good practice; and sources of help and advice for SMEs and their workers. Numerous examples from case studies are also included. Section 10 lists 67 useful publications and multimedia products and 110 useful addresses. Eighteen charts are included. (MN)

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Develop the Worker: Develop the Business

A guide for smaller businesses

Veronica McGivney

NIACE
THE NATIONAL ORGANISATION FOR ADULT LEARNING

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Introduction: About the Manual

This manual has been produced with support from the European Social Fund through the Community Employment Initiative. It is the outcome of a transnational project entitled 'New Approaches to Integrating Women in the Labour Market and Maximising their Potential' and involving partnership with the Company for Labour and Economy Promotion (GFAW) in Thuringia, Germany and Aontas, the National Association of Continuing Education in Ireland. The project was directed by Veronica McGivney, Research and Development Officer at NIACE, and managed by Margaret Crosbie, Research and Development Co-ordinator.

Whereas the German and Irish partners were concerned with training and qualifying women to help them gain employment, the British part of the project concentrated on the next stage – exploring ways in which women who are already in the labour market but often working on a part-time or casual footing, can be helped to develop and upgrade their skills. Since the majority of British workers are employed in small and medium-sized enterprises (SMEs), our primary focus has been on identifying effective strategies that can be adopted by smaller employers to train and develop their female workers.

The project involved a review of existing research and survey findings and a series of seminars for small businesses conducted collaboratively with Training and Enterprise Councils (TECs). The principal aim was to explore ways in which small and medium-sized organisations (SMEs) in Britain might adopt effective training and development strategies for their employees, particularly those working part-time and in other flexible ways. Although the majority of part-time and flexible workers are women, the number of men working flexibly is also increasing rapidly. The manual is therefore devised to help organisations consider ways of developing employees of either sex.

Background

The move towards flexible working patterns, in particular part-time working, has been a striking characteristic of recent employment practice in Britain. Despite their growing numbers, however, employees who work part-time (the vast majority of whom are women) or in other flexible modes generally receive far fewer opportunities for training and development than those working full-time. Many part-time workers work in small or medium-sized organisations. Although these account for a significant proportion of total employment in Britain, surveys consistently reveal that smaller employers provide the least training and many are reluctant to take action to encourage more employees to train. In consequence, many employees in SMEs receive no training other than a brief induction and are usually expected to acquire their technical skills on the job. In view of the frequently mentioned skills gap in British industry and the rapid changes taking place in the national economy and in the structures and organisation of work, this bodes ill for a nation trying to upskill its workforce and achieve a set of relatively modest education and training targets.

The National Targets

Overall Aim

To improve the UK's international competitiveness by raising standards and attainment levels in education and training to world class levels through ensuring that:

1. All employees invest in employee development to achieve business success.
2. All individuals have access to education and training opportunities, leading to recognised qualifications, which meet their needs and aspirations.
3. All education and training develops self-reliance, flexibility and breadth, in particular through fostering competence in core skills.

Targets for 2000 – Lifetime Learning

1. Sixty per cent of the workforce to be qualified to NVQ level 3, Advanced GNVQ or 2 GCE 'A' level standard.
2. Thirty per cent of the workforce to have a vocational, professional, management or academic qualification at NVQ level 4 or above.
3. Seventy per cent of all organisations employing 200 or more employees, and 35 per cent of those employing 50 or more, to be recognised as Investors in People.

The Manual

SMEs differ enormously in terms of size, sector and the type and scale of their operations. They can include small owner-managed businesses with a workforce of less than five and organisations with over 100 workers. Some may be a long way down the training road; others will have barely begun. The manual is designed as a basic practical guide, aimed primarily at owners or managers of smaller businesses who would like to initiate or improve staff training and development activities but are not sure how to do so. Since many SMEs experience genuine difficulties in providing training for all their workers, the manual has been devised to suggest ways in which they might overcome some of the obstacles they face and adopt a more strategic and comprehensive approach to training their workforce. It is based on the first-hand testimony of small business owners and staff and training providers, gained at events organised and attended for this project, and the findings of recent surveys, research and other projects on training in SMEs.

The manual is organised in ten sections:

- Facts and Figures (about SMEs and flexible working)
- Some facts about employer-provided training
- A consideration of the constraints and difficulties faced by SMEs in providing training
- The arguments for providing training
- An examination of skill needs

- Some examples of training approaches and strategies
- How to motivate employees to participate in training
- Examples of small organisations and groups that have adopted effective training strategies and agencies that are facilitating or supporting training for SMEs
- Sources of help and advice for SMEs
- Useful resources and addresses.

Terminology

APL, the Accreditation of Prior Learning, allows people who are already competent in their job to have that competence recognised through the award of units towards an NVQ or SVQ. APL is a good means of assessing and recording the existing skills of your workforce and thus avoiding duplication in training.

Competence is the ability to do a job to the standards necessary in the workplace. All NVQs are based on standards of occupational competence.

DFEE, Department for Education and Employment.

Functional Analysis is a means of determining the standard of competence needed in the workplace. Functional analysis starts with the outcome or objective of a process, such as producing a product, and works back to determine what resources, skills and equipment are needed to achieve it.

Individual Action Plans detail how a skill need will be met. Ideally they should state objectives, and what will be done to meet the objectives, for example, courses and on-the-job training, and should be kept up-to-date and reviewed on a regular basis. Many companies are increasingly placing responsibility for this with line managers, through performance appraisal. For young people Action Plan progress may be recorded in a record of achievement, such as the National Record of Vocational Achievement (NROVA), issued by NCVQ.

Industry Bodies set the competence standards for the appropriate sector. Industry Bodies are employer-led and ensure that standards remain up-to-date and relevant to the workplace.

MCI, the Management Charter Initiative, has produced statements of competence for managerial roles similar to those produced under NVQs. MCI's broader role is the identification and promotion of management skills.

NCITO, the National Council of Industry Training Organisations, co-ordinates and promotes sectoral Industry Training Organisations (ITOs). ITOs can provide information on training opportunities and developments in your industry sector. To find which ITO covers your business sector contact NCITO.

NCVQ, the National Council for Vocational Qualifications, approves all NVQs and has more information on the NVQ framework.

NVQs or National Vocational Qualifications are qualifications based on the best standards of occupational competence. NVQs are composed of distinct units which are in turn composed of elements of workplace competence.

Open Learning (OL), sometimes called flexible learning, refers to a range of training techniques where trainees study out of the traditional training environment. OL can include Computer-Based Training (CBT), distance learning, such as correspondence courses, Interactive Video (IV) and workbook-based courses. To be most effective trainees using Open Learning should have support from readily available tutors or trainers. Some companies have invested in Open Learning centres on the work premises. OL can be a cost-effective way of meeting training needs.

SMEs, small and medium-sized enterprises.

SVQs or Scottish Vocational Qualifications, the Scottish equivalent of NVQs, are awarded by SCOTVEC, the Scottish Vocational Education Council.

TECs, Training and Enterprise Councils (in Scotland 'Local Enterprise Councils', LECs).

Adapted from CBI (undated), Investors in People seminar papers

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Some Facts and Figures

Changes in Working Patterns

In the last 15 to 20 years there have been a number of changes in employment patterns. These can be summarised as follows:

- growth of the service sector
- increase in the number of small businesses
- increase in the number of women entering the workforce
- increased demand for higher skills and diminished demand for semi-skilled and unskilled manual workers
- the likelihood of several career changes within an individual's working life
- greater use of information technology in working
- a shift from permanent full-time employment to forms of flexible employment such as part-time, temporary, portfolio and contract work, flexi-time working and job-sharing.

Flexibility is now considered to be a key feature of employment. The term refers not just to working hours but also to employee numbers and the timing and location of work.

It is often pointed out that the full-time, continuous work pattern that employees, particularly males, could expect a few decades ago is becoming comparatively rare. Only 27 per cent of jobs on offer to those re-entering the work force are full-time permanent posts (Women Returners Network, 1996). In 1995, about 1.6 million workers in Britain were employed on a temporary basis – more than six per cent of the entire working population (*The Guardian*, 1995). More recently it has been estimated that almost ten per cent of the working population are employed on a temporary, seasonal or fixed-term contract basis (*Open Learning*, 1996). It has been estimated that by the year 2010, only 50 per cent of the UK workforce will be in full-time, permanent employment; the others will be 'flexible' workers (Cadbury, 1996).

Charts 1, 2 and 3 indicate that employers are increasingly using non-full-time workers in running their businesses.

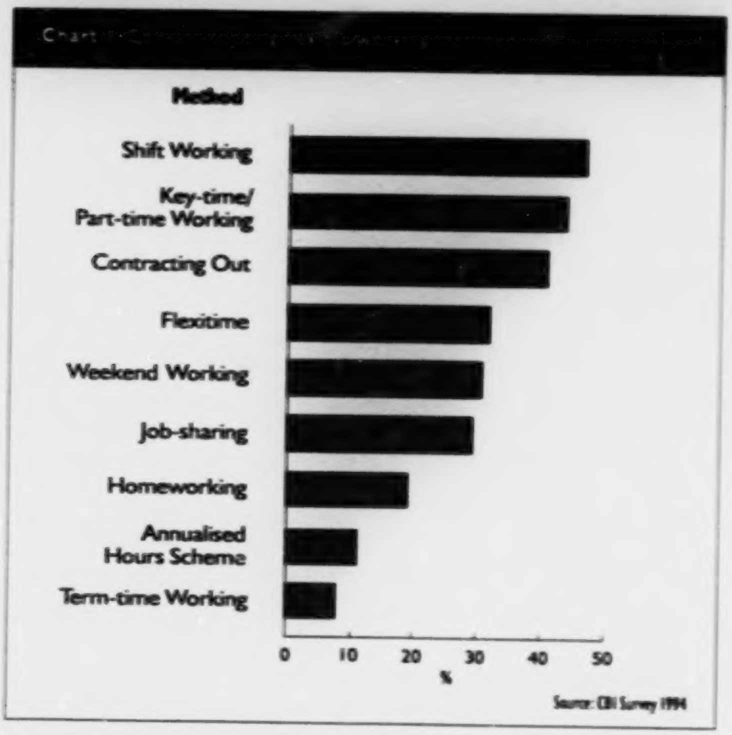


Chart 1: [illegible]

From CBI, 1994, *Flexible Labour Markets: who pays for training?*

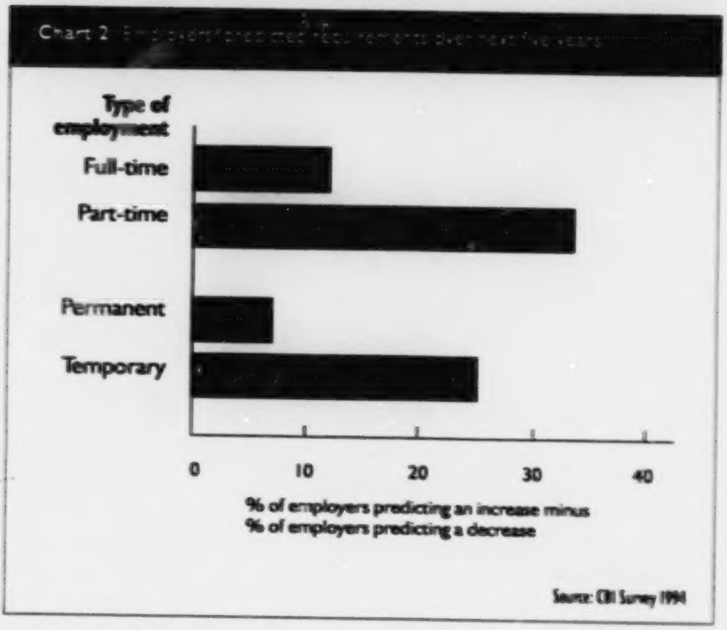
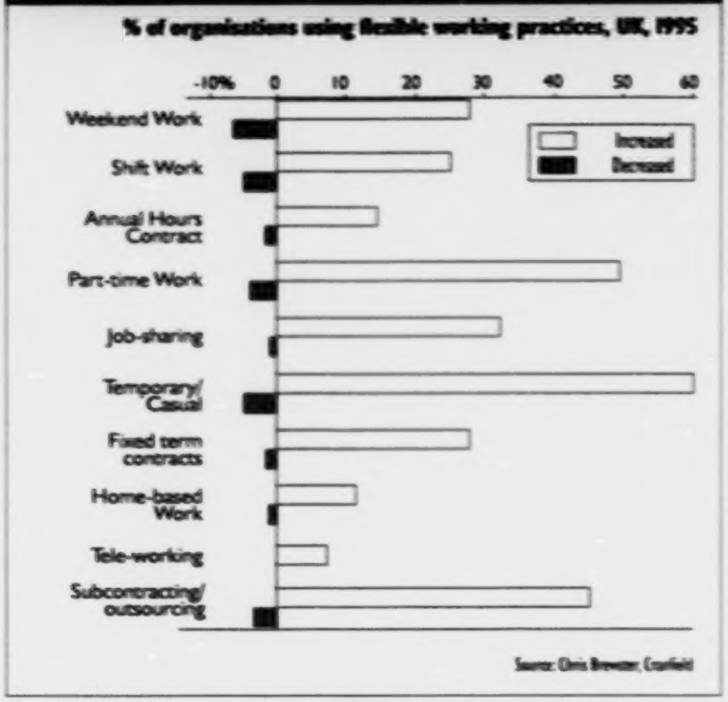


Chart 2: Employers' forecasted requirements over next five years

From CBI, 1994, *Flexible Labour Markets: who pays for training?*

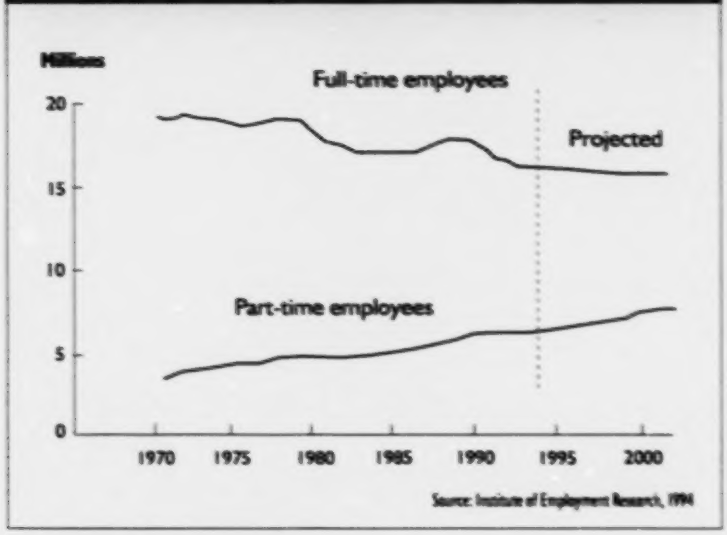
Chart 3 [illegible]



Source: Chris Brewster, Cranfield

From Careers section, *The Guardian*, 22 April 1995

Chart 4 Changes in employment status: full time and part time [illegible]



Source: Institute of Employment Research, 1994

From Institute of Employment Research, 1994

Part-time work

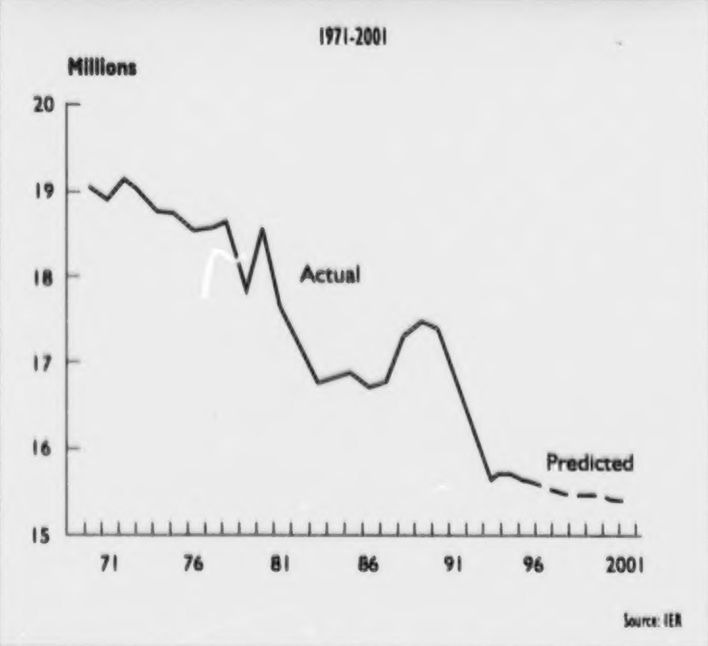
Part-time work has been the fastest growing of all flexible working trends. Between 1971 and 1995, the number of part-time employees jumped from three and a half to seven and a half million. In 1994–95 full-time jobs grew by 21,000 but part-time jobs by 81,000. By June 1995 there were seven million part-time workers (see Charts 4, 5 and 6). It is estimated that approximately 30 per cent of jobs are now part-time.

Characteristics of part-time workers

While the vast majority of part-time (and temporary) jobs are held by women (about half of all women in the labour force work part-time), the total number of men in part-time employment has also increased significantly: it rose by 40 per cent between 1993 and 1996 (see Chart 7).

Part-time workers tend to predominate in occupational areas such as clerical and secretarial work, sales, and personal and security services (Labour Force Survey, 1993). As a whole they tend to be less well qualified than full-time employees and many have no qualifications. This means that qualification levels are lowest among one of the most rapidly growing clusters of the workforce (see Chart 8).

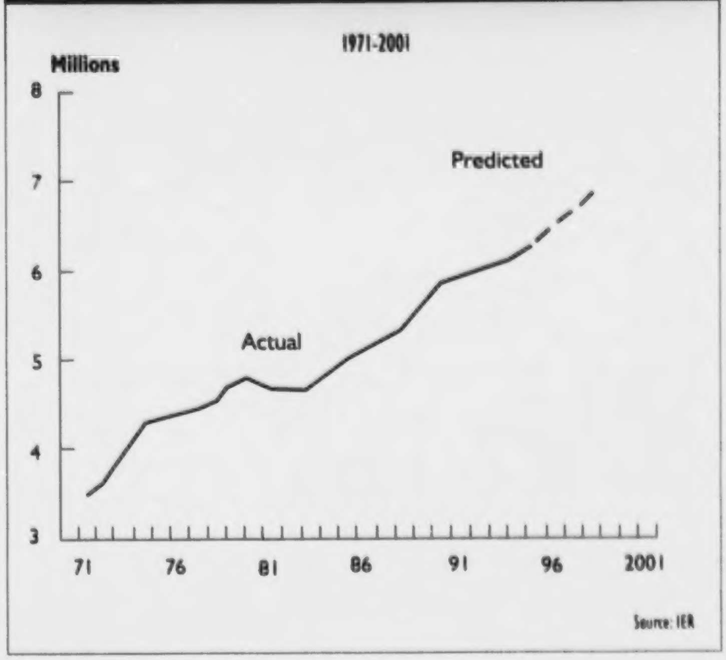
Chart 5 Changes in full-time employment in the UK



Source: IER

From CBI, 1996

Chart 6 Changes in part-time employment in the UK



From CBI, 1996

Chart 7 Employment status by gender, %

	Men	Women
Traditional workforce		
Full-time permanent employees	73.2	47.9
Flexible workforce		
Full-time temporary employees	2.8	2.3
Part-time permanent employees	3.7	36.7
Part-time temporary employees	1.2	3.9
Other	19.0	9.2

Source: Labour Force Survey 1993

From CBI, 1994, *Flexible Labour Markets: who pays for training?*

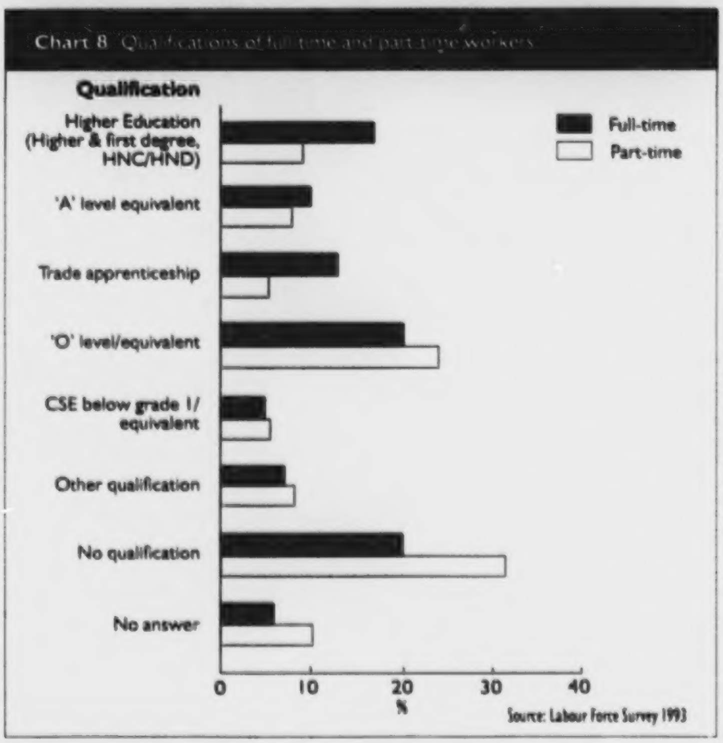


Chart 8 Qualifications of full-time and part-time workers

Source: Labour Force Survey 1993

From CBI, 1994, *Flexible Labour Markets: who pays for training?*

The Growth of Small and Medium-sized Businesses

A large proportion of part-time workers are employed in small and medium-sized enterprises (SMEs).

The following European definitions of enterprise size have been adopted:

Definition	**Micro**	**Small**	**Medium**	**Large**
Number of employees	1–9	10–99	100–499	500+

Source: Eurostat, *Enterprises in Europe*

SMEs are characterised by diversity and flexibility. The majority operate in the following sectors:

- construction
- business services
- wholesale
- retail
- repairs
- manufacturing
- financial services.

It has been estimated that there are more small firms per head of population in Britain than in the rest of the EU as a whole.

Some facts about SMEs

Ninety-nine per cent of all businesses in the UK employ fewer than 50 people. Businesses employing fewer than 20 people account for 35 per cent of total employment, and those employing fewer than 50 account for nearly 50 per cent (Monks, 1996).

In 1995, companies with fewer than 100 employees were responsible for employing more than ten million people – more than 50 per cent of total non-government employment. This compares with 40 per cent in 1979 (Department of Trade and Industry, 1995).

It is widely predicted that the number of small firms will continue to increase while larger ones will continue to 'downsize'.

Since the SME sector provides high levels of employment and is a major source of new job creation, it is of key importance in the British economy. It follows that the skill levels of people employed in SMEs are also crucial to national economic health. So what kind of training and development opportunities do they receive?

The next section will look at recent training trends and practices among British employers.

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2

Employers and Training

The term 'training' is used here in a very broad sense. It has been defined as:

> *... processes and activities, both formal and informal, that contribute to people's acquisition of work-related knowledge and skills. As a component of human resource development, training is in turn concerned with the overall appraisal, adaptation and career development of an organisation's people over time. The term training is taken to incorporate an understanding of the process whereby learning is achieved both experientially, 'on-the-job' and theoretically and in reflection upon practice* (Lane, 1994).

Although employers continue to be the major provider of training, many workers receive little or no training at work. In 1995, approximately 50 per cent of workers received no training at all (Monks, 1996).

According to recent research by the Institute of Personnel and Development, more than half of all training is carried out at workstations by a manager, supervisor or peer workers but often this process is neither recognised as training nor valued (Nash, 1997).

In most firms, regardless of size, training is closely related to a worker's position in the company hierarchy.

Most surveys reveal that the workers who are most likely to receive some employer-provided training are:

- people with qualifications
- managers
- professionals
- supervisors
- technicians
- younger workers (under 35)
- people in full-time jobs
- clerical/secretarial workers.

Off-the-job training tends to be concentrated on younger workers and those with qualifications.

Developmental training is mostly offered to people in managerial or higher administrative positions (see Chart 9).

Chart 9 Companies' readiness to train all staff in the next year, %

	Likely	Possible
Managers	78	17
Professionals	69	17
Supervisors/technicians	67	15
Clerical/secretarial	66	27
Craft/skilled workers	44	18
Other non-manual	37	20
Other manual	35	20

Source: CBI Survey 1994

From CBI, 1994, *Flexible Labour Markets: who pays for training?*

Chart 10 Employees likely to receive training in the next year, %

Type of employment	Likely	Possible	Unlikely	N/A
Perspective A				
Full-time	86	12	2	1
Part-time	46	24	16	14
Perspective B				
Permanent	80	9	3	7
Temporary	22	28	35	16
– directly employed	18	24	36	22
– agency	8	13	58	22

Source: CBI Survey 1994

From CBI, 1994, *Flexible Labour Markets: who pays for training?*

Differentials between part-time and full-time workers

Those least likely to receive training from their employer are unskilled and semi-skilled workers and those who are not full-time employed or on the permanent staff. These workers tend to receive, at the most, short induction and informal on-the-job training.

> *Too many employers feel no responsibility for investing in their part-time and temporary staff. Last year over half of Britain's workforce had no training arranged for them by their employer* (Monks, 1996). *(See Chart 10.)*

Despite their increasing importance in the labour force, therefore, part-time and other flexible workers generally receive far less training and development than those in full-time employment.

Many employers believe that training full-time employees represents better value for money than training 'peripheral' workers and there is still an assumption that 'real' work involves working long hours. Some employers also assume that part-time workers are less committed to the job than core, full-time employees (McGivney, 1994).

A number of companies that responded to the CBI 1994 survey said that the kind of training they offered flexible workers tended to be restricted to induction, health and safety issues and technical skills for the job. Longer-term development was regarded as neither appropriate nor feasible for flexible employees.

The shift towards flexible working is therefore leading to a two-tier system of career development and undermining rather than assisting efforts to create a higher skilled workforce:

> *The trend towards part-time and temporary jobs may be serving to reinforce the low skill equilibrium: while the loosening of fully fledged contractual ties is heralded as the promotion of positive flexibility it may also weaken the employment arrangements whereby training is most effectively organised. Thus there may be serious disjuncture between a Lifetime National Target that all employees should take part in training or development activities and the introduction of flexible arrangements that remove the institutional structures and incentives for training* (Istance and Rees 1995).

The CBI (1994) has warned that some flexible workers are caught in a vicious circle of low pay and low skills. While those working in the professions will continue to update and upgrade their skills regularly, others could face progressive deskilling and, without remedial action, become 'trapped in disadvantage':

> *Whilst flexibility of employment itself is a welcome trend in a fast changing economy, there is a risk that a significant proportion of the population – women in particular – will find themselves on the periphery of the labour force unless ways and means can be found to enable them to update their skills and competencies* (CBI 1994).

Since the vast majority of part-time workers are women, exclusion of part-time employees from training may be against the law. Access to training is covered in Sections 14 and 16 of the Sex Discrimination Act.

> *It is in the employer's interest to ensure that all employees, regardless of gender, are given equal access to the training appropriate to meeting the company's business objectives. The majority of flexible workers are women and it is important that where training for flexible workers differs from that for full-time employees it is because of the flexible employment pattern and not on grounds of gender* (CBI, 1994).

Training differentials between male and female workers

Many surveys show that male workers tend to receive more intensive and advanced training at work than female employees, although there are variations according to age. For example, older women returning to the labour market after a career break receive more training than men of the same age, although this may be restricted to short induction training. However, men are more likely than women to receive off-the-job training while women are often restricted to on-the-job training. They are also often trained at a lower qualification level than men.

The majority of all National Vocational Qualifications (NVQs) gained by women are in the clerical and secretarial area while men's awards are spread across a wider range of occupations. Women are also strongly concentrated at the lower NVQ levels, particularly Level 1. Over 12 per cent more men than women are qualified to NVQ Level 3.

Although pilot projects on the accreditation of unpaid work suggest that many women are operating at the equivalent of NVQ Level 3 in their unpaid work in the home and in voluntary organisations, many find it difficult to have their experience recognised and accredited (McGivney, 1994).

Training differentials between small and larger firms

Training opportunities are unequally distributed across companies. Although companies employing less than 50 workers account for half the total workforce, they provide considerably less training than larger employers do (Monks, 1996).

Broadly speaking, the smaller the firm, the less likely it is to offer systematic training to employees. This is understandable:

> *The larger an organisation is, the easier it is for it to train its employees. It will have access to capital, it will benefit from economies of scale and hence will be less likely to have work flow problems and will on average pay higher and so be more able to retain trained staff* (Hillman, 1996).

One survey has found that one in four of smaller firms have undertaken no training in the last 12 months and under 50 per cent have structured programmes for deciding what their training needs are. Few know where to seek guidance and information (Institute of Management, 1996).

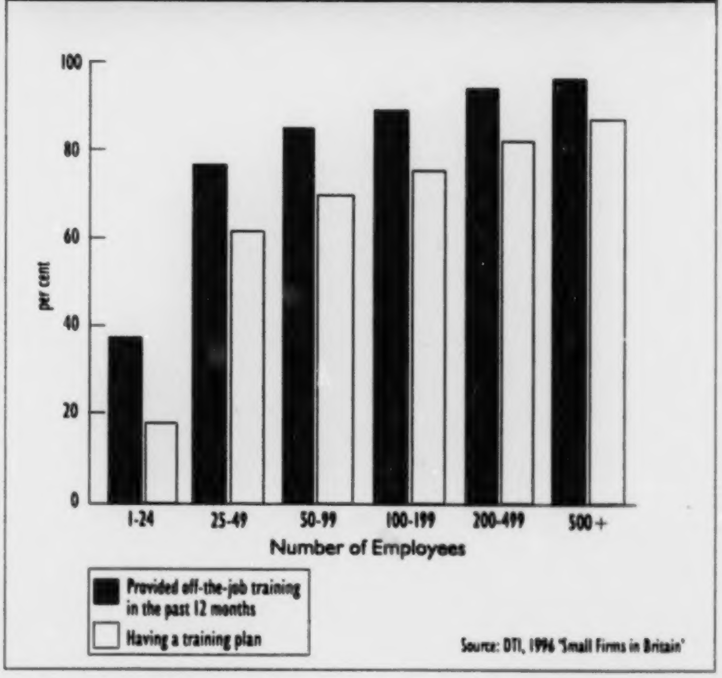
Another survey has found that while a large majority of smaller companies claim to regard training as a priority, only eight per cent actually set aside any budget for it (Lloyds Bank Small Business Research Trust, 1996). According to the CBI in 1996, 41 per cent of smaller companies had not undertaken any training of their employees in the preceding year.

A study conducted at Warwick Business School and the Foundation for Manufacturing and Industry (1997) found that while three-quarters of medium-sized firms have training policies, only a third link them to business plans.

There are, however, wide differences between sectors, with some requiring employees to update their technical skills on a regular basis. A study of Welsh engineering SMEs, for example, found that 71 per cent had a training budget, training policy or training plan (University of Wales, 1997).

Another survey of 300 SMEs (Lane, 1994) found that 83 per cent of respondents had arranged or approved some training sessions during the previous 12 months. The majority had conducted a wide variety of training activities, both on- and off-the-job, formal and informal, depending on requirements. Ten per cent had in-house training centres while a small number were using external training supported by in-house mentoring systems. The majority of respondents to the survey considered training to be central to their success and critical for the future. It was offered to ensure that the skills base was sufficient to achieve company aims and targets, to meet identified skills shortages and to maintain quality. However, although most responding companies viewed training as part of company strategy and considered it very beneficial, they did not carry it out very often!

Chart 11 Training activity by size of organisation, UK (per cent) 1994–5



Source: DTI, 1996 'Small Firms in Britain'

From Hillman, J. (1996) *University for Industry: creating a national learning network*, IPPR

Some characteristics of training in SMEs

The employees most likely to be trained in smaller organisations are those in higher grade professional or technical occupations, plant and machine operatives and recent recruits. Training for workers in organisations with fewer than 25 workers is often informal, in-house and on-the-job, provided by the owner or most senior person in the company (Employment Department, 1995).

Off-the-job training offered to workers in SMEs is most frequently offered in areas such as Health and Safety, New Technology, introductory training, management and supervisory training. This is usually provided by private training companies, consultants, TECs, further education colleges, professional associations, equipment suppliers, higher education institutions and industrial training organisations.

In the smallest companies the emphasis is on hands-on rather than theoretical training. Specific task- or job-related training tend to be the most popular forms of training, with the majority of small firms using some in-house expertise.

However, SMEs are very diverse and training policies obviously differ according to their individual objectives:

> *Companies vary in their vision, with some aiming for rapid growth and others for steady growth or niche markets. These differences may well be reflected in different training policies* (Lane, 1994).

Similarly, different companies may encounter different constraints on their ability to train their workforce. These will be considered in the next section.

Some Questions For Employers

Do you provide regular and systematic training for your Workforce?

Is training an integral part of organisational strategy and related to work and production targets?

What kinds of training are currently offered to your Workforce?

For example:

☐ Induction only
☐ New legislation
☐ Health and safety
☐ Technical areas specific to the Product/Service/Business
☐ Supervisory training
☐ New technology
☐ Customer care
☐ Team-building
☐ General or core skills
☐ First aid
☐ Other

Which of your employees are most likely to receive training?

Do part-time and other flexible workers have the same access to training and development opportunities as full-time employees?

Is there a staff member specifically responsible for training within your organisation?

How are the organisation's training needs identified?

Is training currently offered on-the-job, off-the-job or both?

Who provides training for your employees?

☐ Owner/Managers

☐ Supervisors

☐ Other staff members

☐ Outside consultants

☐ External training providers

☐ Other

Does the training you offer confirm workers' existing skills levels or raise them?

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3 Obstacles to Providing Training

As we have seen earlier, many companies now rely largely on part-time workers and people working on temporary contracts but these employees are often excluded from training or development activities. A number of employers believe that flexible working methods make it more difficult to arrange training (CBI, 1994).

The evidence indicates that smaller firms face particular problems. Many are just too small to offer any systematic skills or development programmes to workers. Others would like to do so but experience too many obstacles.

Despite their diversity, many SMEs experience common problems in relation to providing training for all their workers, particularly those working part-time or on shifts. The difficulties most frequently cited are:

- problems with meeting the costs (both direct and indirect) of training
- lack of time within work schedules
- problems with releasing workers from production tasks
- lack of cover for workers who are released for training
- lack of specialists in recruitment, training and appraisal
- problems with finding suitable training.

The national survey 'Skill Needs of Small Firms in Britain 1994–95' found that the greatest perceived barrier was cost (mentioned by 43 per cent of respondents) followed by lack of cover for staff while training (26 per cent).

Other factors also affect the type and quantity of training provided in small firms. These include perceptions and attitudes such as:

- no recognition of the need for more or better skills
- a belief that skills training is unnecessary and that only experience matters
- scepticism about the value of training and qualifications
- fear that employees will take their enhanced skills elsewhere.

There are also a number of structural barriers that deter SMEs from investing in training such as:

- lack of expertise in anticipating, identifying and remedying skills gaps
- lack of expertise in determining training needs and in planning and evaluating training

- lack of a designated staff member or specialist with responsibility for training
- production or operations targets given priority over training and development
- difficulties in communicating training needs to external training providers.

In a British survey (Lane, 1994) SMEs also reported constraints such as skills shortages and lack of access to long-term development funding. Companies operating in high-tech and craft areas complained that the loss of apprenticeships and devaluation of industry within the educational sector have also been considerable barriers to staff training and company growth.

As a result of all or some of these factors, training policies in many SMEs tend to be short-term and reactive rather than an integral and long-term aspect of business.

The North West Training Council has found that most SMEs are:

> *... simply too preoccupied with meeting short-term operational targets. They see training as a necessary but low priority aspect of their business and manoeuvre between the barriers to training, identifying needs and providing solutions over a very short time horizon* (Wilson and Forsyth, 1996–97).

These characteristics are not confined to Britain. A recent study of SMEs in Sweden showed that lower grade workers in such organisations often only receive training if it can be fitted into production; if production is not interrupted and if it does not incur too many costs. Few SMEs set any special time aside for training. As a result:

> *... skills development is marginal and subject to economic fluctuations* (Thang, 1996).

The difficulties experienced by smaller firms are widely recognised:

> *Most small firms cannot realistically create a wider training and development context for themselves. The necessary incentives have to be initiated by the government or other national and local establishments with the means available to them* (Moody, 1996–1997).

Nevertheless many smaller organisations *have* managed to overcome obstacles to training and have achieved positive results. Among those which have not, it is usually attitudes and perceptions as much as practical problems that create the major stumbling block.

Some Questions for SMEs

How far do the problems identified apply to you?

Do you consider training important or irrelevant to the success of your organisation?

What are the main obstacles you experience in providing training for all your workers?

How far have you investigated ways of overcoming these problems?

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4 The Business Case for Training and Developing Employees

Views about the benefits of training often depend on one's own experience of it. It has been observed that employers and managers who have had a positive experience of training are more likely to train their own staff. Conversely, a bad experience of training can lead to scepticism about its value (Lane, 1994).

It is frequently pointed out that businesses and their workers need to keep pace with the rapid pace of economic and technological change. This is best achieved with a better trained and qualified workforce:

> *In this changing business world which demands new skills, new competencies and a different approach, training is no longer optional. The current working environment of constant change means that only organisations which help their employees grow and develop can keep their customers satisfied and make the best use of their resources* (IPD, 1997).

Many small firms which do not conduct training rely heavily on the skills of owner-managers. This can be counter-productive in the long term as was pointed out by a small business owner at a training event for SMEs organised during this project.

> *It's usually quicker for me to do things than train someone else to do it, but then the same problem comes round again and it's a vicious circle.*

One of the ways in which many organisations tried to ride out the recent recession was through reducing the workforce. This could also be counter-productive since it often resulted in a loss of skills which had previously been passed on, often informally, to younger and new employees. Research for the Institute of Personnel and Development suggests that workers currently gain most of their knowledge about their job from other experienced workers (Nash, 1997). Unless new workers in contracting firms are properly trained, they can significantly affect productivity by underperformance.

The evidence shows that investing in the training of staff can produce a range of benefits for an organisation:

> *The skills of their workforce are the key to businesses competing successfully* (CBI, 1994).
>
> *Training can greatly increase an employee's productivity* (McGill, 1994).
>
> *Successful companies train: this is as true for small firms as it is for large organisations* (Gillian Shephard, 1995).

> *Direct business improvements cannot always be measured in hard numbers. Enthusiasm, motivation, initiative and innovation, the 'feel' of a successful business and the ability to adapt quickly to change, can all stem from an organisation's commitment to its people and its investment in them* (Skelland, 1997).

Research by the Confederation of British Industry and the Department of Trade and Industry has shown that a characteristic shared by the 100 most successful organisations in the UK is *a commitment to developing employees.*

It needs more than words, however, to change employer practices. For many smaller employers, training non-managerial workers is not a priority in today's economic climate because of the time and costs involved. Those who manage to be successful without having invested in the development of their workforce will need strong persuasion that it will be of benefit to them, relevent to the business and something which will have concrete and visible pay-offs.

What encourages employers to train their workers?

Responses to the CBI survey of employers (1994) indicated that most companies would provide more training if they were persuaded of the business benefits. Similarly, a survey of small businesses revealed that managers' willingness to implement training depended on their being able to see that it would have an impact on day-to-day practice (Lane, 1994).

It is therefore not an abstract belief in the value of training that encourages employers to develop their workers and encourage a workplace learning culture, but the expectation that they will derive real benefits from doing so. These benefits have been summarised by Hertfordshire TEC (see Section 8) as 'ability':

> *from an employer's perspective, the key word is sustainability: from an employee's perspective it is employability.*

Employers are often prompted to consider introducing training strategies when they are faced with practical factors such as increased competition, financial crises, technological change, organisational change, expansion and shifting markets (McGill, 1994). Competition, for example, requires firms to move towards greater productivity, more efficient working practices and team work, all of which are dependent on staff skills. The need to improve quality to meet customer satisfaction is another factor that requires a focus on employee skills. If an organisation is supplying other enterprises with goods or services, it may find that they demand quality standards that match their own.

Studies of smaller firms have identified some of the characteristics of companies which have survived the recession and achieved economic success:

- strategic management
- anticipation of business development needs

- anticipation of change by training or buying in skills
- enlargement of product (or service) range
- diversification of markets
- the adoption of more customer-focused strategies
- modernisation of production processes (Lane, 1994).

Most of these have strong implications for staff training.

What are the benefits of training the workforce?

Providing training can help employers to:

- remedy skills shortages
- comply with compulsory health and safety or other regulations
- implement new legislation
- introduce new technology
- implement changes brought about by restructuring
- respond to changing customer demand and quality requirements
- achieve quality standards such as the Investors In People award and BS5750
- improve worker attitudes and motivation
- encourage team work and achieve better working relationships
- reduce staff turnover and keep down recruitment costs.

Staff retention is an important issue in small businesses. As the owner-manager of a small optician's business pointed out at an event for SMEs organised during this project:

> *There's always a problem when someone leaves. It can take a while to find the right person, sometimes we try two or three people before we settle down again.*

Some smaller organisations resist training because of the fear that staff might get jobs elsewhere. However there is some research evidence that, in many circumstances, training actually *increases* retention (Metcalf *et al*, 1994). It can also increase recruitment of good quality workers.

Businesses can lose both money and customer goodwill if workers are not adequately trained and motivated, whatever their mode of working:

> *Many employers realise that customers do not differentiate between full-time, part-time and temporary workers in their evaluation of the service they receive. Many organisations now train their flexible workers, particularly those in customer contact roles to meet the same standards as their full-time employees* (CBI, 1994).

There is considerable evidence that offering employees good quality training and development brings about significant improvements in productivity, morale, working relations and overall performance. Research conducted for the Employment Department indicated that companies which had improved training for lower skilled workers had found that it increased motivation and fulfilment and led to a more committed and productive workforce. One medium-sized food company that had started to provide extensive training for manual employees as well as management reported that workplace training including literacy and basic numeracy had increased workers' sense of self-worth and given them greater job satisfaction. Employees were found to be more motivated and work teams had a stronger sense of commitment and identity (Metcalf *et al*, 1994).

Other organisations have similarly found that workers who are offered training feel more valued and this increases their confidence level, loyalty and commitment to the firm as well as general motivation. They derive greater job satisfaction and may be more willing to take on extra responsibility, use their initiative and expand their role. This can give an organisation a competitive edge (Holme, 1992).

> *Ultimately (...) improved morale and motivation should lead to increased productivity so the impact on people of investment in them should not be ignored* (Skelland, 1997).

Companies of *all* sizes can gain through having a better trained and motivated workforce. In smaller firms staff under-performance can particularly affect productivity and it may be vital to economic survival to upgrade their skills.

When managers of smaller firms were asked in a survey about the factors that contributed to their business success, they cited two in particular:

- *the commitment and motivation of the workforce*
- *the quality of the product/service* (Lane, 1994).

The second factor (which is undoubtedly dependent on the first) was the reason most often given by smaller companies with higher levels of entrepreneurial ownership. In these:

> ... *close team working was cited as paramount and staff commitment was taken for granted* (Lane, 1994).

Providing employees with good quality training can also raise a company's profile and enhance its reputation among investors and potential recruits, as some of the case studies in Section 8 demonstrate (see Chart 12).

Chart 12 The business benefits of communicating training effort

World-class organisations widely disseminate the results of their training effort because there are business benefits to be obtained:

- Shareholders and analysts increasingly place emphasis on excellence in training and development as a sign of a successful company worth investing in.
- Organisations send signals to their workforce as to the importance they give to their development, which leads to better motivated and more loyal employees.
- The best people will be attracted to those companies which demonstrate that they develop their employees.
- Demanding customers want high quality products and services and these are produced by organisations which train their workforces effectively.
- As stakeholders in the community, they will be keen for a wider audience to be aware of their good practice in the area of education, training and development in order to gain a 'licence to operate'.

Source: CBI, 'Realising the Vision: a skills passport', 1996

Some Questions for SMEs

What are the principal factors that have motivated you to offer training to your employees to date?

What benefits has training had for your organisation and for individual employees?

Which factors would be most likely to encourage you to invest in training your workforce in the future?

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5 Skill Needs

Surveys of employers over the last five years show that many of them believe that workers increasingly need more skills than in the past. In the 1996 'Skill Needs In Britain survey' conducted for the DfEE, 74 per cent of employers – 14 per cent more than in 1993 – said that the skills required of average employees had increased. Forty-three per cent of employers with hard-to-fill vacancies complained about the shortage of suitably skilled people and 20 per cent thought there was a gap between the skills of their current employees and those needed to meet their business objectives. As in previous surveys, the principal skills identified as lacking were management skills, general communication skills, computer literacy, personal skills, practical skills, literacy and numeracy skills.

Several of the case studies included in Section 8 (for example, Squeaky Clean and S.V. Salads) indicate that the key to a successful organisation is good managerial skills. Yet in many cases directors and managers of smaller organisations have had no formal management training whatsoever. When managers are exposed to training, their attitudes to training their employees often change significantly, leading to a more proactive approach to staff development and subsequent enhanced productivity and performance.

Communication skills are now considered to be very important. Many jobs require staff to have ability and confidence in written communications as well as in verbal exchange and comprehension. Most firms also require their employees to have the *literacy and numeracy skills* necessary for conducting administrative and secretarial tasks, book-keeping, reading operating instructions and other documentation, completing job sheets, logging orders, sorting and dispatch, etc. A report by an employers' group, 'Industry in Education', quotes some who expressed a need for staff with even more basic skills such as the ability 'to address an envelope' (*The Economist*, 1996). A national survey has revealed that nearly half the population lacks the basic literacy and numeracy skills required to cope with modern life and work (McLeod, 1997).

New Technology has had a significant impact on working practices and many employers require staff with some basic *computer literacy and keyboard skills* as well as the ability to use computers for scheduling, working with speadsheets and databases, stock and production control, accounting systems and payroll. Staff may also need to operate computer-controlled machinery.

Despite the fact that employers frequently deplore the shortage of people with the skills listed above, many restrict the training they offer to induction and the specific technical skills needed for the job. This may be short-sighted. The evidence suggests that in a rapidly changing economic environment, job-specific training may no longer be enough to keep organisations (and individuals) competitive:

> *Only an extension of broad-based educational skills can prepare employees for the unpredictable demands of new production methods and economic conditions as we move towards the year 2000* (University of Leeds, 1993).

Flexibility and multi-skilling

Over the last decade, many businesses have experienced a contraction of their workforce. However, 'downsizing' often leads to employers expecting more from the remaining staff members. A smaller workforce may be required both to achieve higher productivity and to develop a broader range of technical and personal skills – in other words, to become more flexible:

> *Flexibility involves multi-tasking, the concept that one worker can perform a number of separate tasks within the firm. This in turn involves a greater or lesser element of multi-skilling* (University of Leeds, 1993).
>
> *The challenge is for organisations to learn how to manage the development of individuals in a way that allows them to develop the right skills but is not based on the job they do.*
>
> *An increasingly popular approach is to replace job descriptions with defined sets of competencies that identify the technical and organisational skills an individual needs, and how to determine whether an individual possesses them ... This approach requires people to have many more skills than the traditional model (hierarchies and clear-cut jobs) required. People have to be able to work in groups, problem solve, manage themselves and understand their business as well as learn more than one 'job' because, as team members, they are expected to perform multiple steps in the production processes* (Lawler and Finegold, 1997).

A recent study of Welsh engineering SMEs found that over 40 per cent had developed plans to 'multi-skill' employees while a further 33 per cent were encouraging staff to enlarge their skills. Specific training in social and team-working skills was reported by 37 per cent (University of Wales, 1997).

It has been found that there are benefits to be gained from training workers to become more flexible:

> *The best companies have already understood that, if they are to retain their own right to flexibility, they also need to make their workers as flexible as possible. They will be rewarded (...) not just with less anxious employees but with higher quality ones, as the best people queue to work for firms that offer not the illusion of security but an opportunity to stay employable* (*The Economist*, 16 March 1996).

The Importance of Having Workers with Both Technical and Key Skills

Firms wishing to introduce quality improvements and achieve standards such as BS5750 or specific Customer Care objectives require staff to have the range of skills appropriate to meeting these standards:

> *No longer can firms afford to underwrite arcane demarcation lines between skills.*
>
> *The demands of an ever-more discerning market mean many small and medium-sized firms in Europe are striving to adopt new quality assurance and standards. With the need to streamline their operations, this has been the driving force behind the abandonment of rigid skill definitions* (Weston, 1997).

In one survey (Lane, 1994), SMEs expressed a need for workers with, on the one hand, a high level of technical competence and, on the other, the ability to think for themselves, solve problems and adapt to the demands of differing jobs and customers. They also placed importance on team-working and employee involvement in task-related decision-making. They did not want workers who were incapable of relating to customers or making decisions on how to meet diverse customer needs.

Thus today's employees need both

Occupational skills:

- relevant experience
- relevant qualifications
- industry-specific skills

and

Key skills:

- personal skills (communication skills, team-working skills)
- flexibility and willingness to change
- literacy and numeracy
- problem-solving skills
- IT skills.

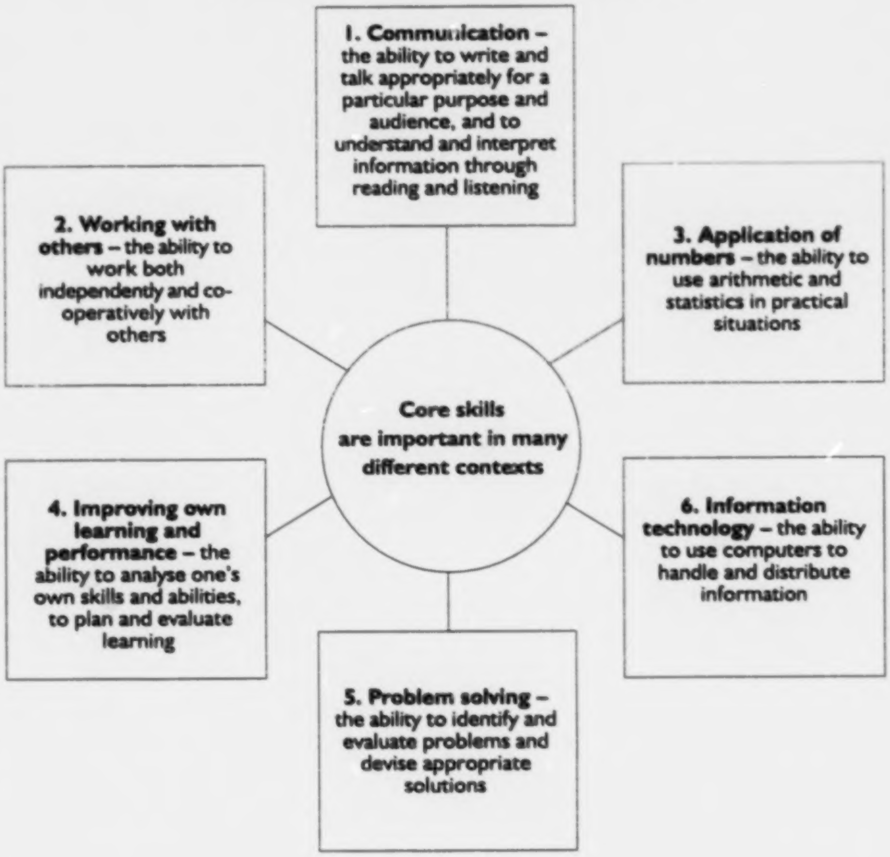
Core (now often referred to as 'key') skills are frequently under-rated in terms of their contribution to an organisation's business success and to individual employability. However, the CBI (1994) has suggested that their possession is critical to the successful employment of all members of the workforce. Flexible workers moving frequently from one job role to another need to draw on such skills in order to perform effectively in a new working environment.

Chart 13 Core skills

Core skills are a group of skills central to all work and learning. They are valued by employers and essential for individuals.

Individuals with well developed core skills are more flexible in learning and work and better able to adapt and apply themselves to new contexts.

The core skills, in order of value to employers, are:



Core skills are important in many different contexts

1. Communication – the ability to write and talk appropriately for a particular purpose and audience, and to understand and interpret information through reading and listening

2. Working with others – the ability to work both independently and co-operatively with others

3. Application of numbers – the ability to use arithmetic and statistics in practical situations

4. Improving own learning and performance – the ability to analyse one's own skills and abilities, to plan and evaluate learning

5. Problem solving – the ability to identify and evaluate problems and devise appropriate solutions

6. Information technology – the ability to use computers to handle and distribute information

Development of five core skills at five levels can be recorded through core skill units accredited by the National Council for Vocational Qualifications (NCVQ). A unit for problem solving is being developed, but has not yet been accredited by NCVQ. The Scottish Vocational Education Council (SCOTVEC) has developed a separate system of core skill units.

Source: CBI, 'Realising the Vision: a skills passport', 1996

Identifying Skill Needs

The identification of the skills needed to meet business targets is fundamental to organisational effectiveness. Skill requirements – and the ability of existing workers to meet them – need to be monitored on a regular basis to keep pace with internal changes in organisational structures and goals, and external changes in markets, technology, workplace legislation etc. As some of the case studies in Section 8 show, changes such as expansion or contraction as well as pressures of production, have often jolted employers into realising that existing staff skills are not sufficient to meet current requirements.

One company has found that an effective way of identifying skill needs is to conduct regular customer/client surveys to obtain an impartial view of the service or product the organisation is providing.

Some Questions for Employers

How does the organisation currently identify skill needs and gaps?

What skills are needed to meet production, organisational or business targets?

Does the organisation attach importance to the skills held by workers other than those required for the job?

What general (as opposed to technical) skills are required by your employees to help the organisation function effectively?

What importance do you attach to team-working, good communication skills, basic literacy and numeracy, problem-solving and using initiative?

Has the organisation conducted a staff skills audit?

Are workers' additional skills recorded?

Are skill gaps filled by seeking new recruits or by training existing staff?

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6 Training Strategies

Five simple steps can be taken to initiate a training strategy:

- conduct an audit of the organisation's skill needs
- identify any skill gaps
- conduct an audit of existing staff skills, knowledge and their application at work
- identify the training needs of individual employees to help them perform more effectively in their job and meet any skill gaps identified
- seek or organise appropriate training activities to meet those needs.

Choosing an appropriate type of training

Appropriate training is training which:

- is related to organisational goals, targets and skill needs
- is efficient and cost-effective
- can be undertaken by employees whatever their working mode
- has a noticeable impact on both individual and organisational performance.

Providing suitable training for employees in very small firms can be difficult. Externally-provided training is often geared to the circumstances of large companies and there has been a tendency:

> *... to over-emphasize formal training that is supply-led at the expense of training that is on-the-job, enterprise-specific and demand-led* (Lane, 1994).

Traditional training methods (such as external training courses) are not necessarily suitable for small businesses for a number of reasons: because of the costs involved and disruptions to work flow; inconvenient timing and duration and inappropriate or irrelevant content (Scriven, 1991).

Small firms are very diverse and their training requirements are consequently very specific. A survey (Lane, 1994) revealed some criticism of Training and Enterprise Councils and independent consultants for their tendency to act as suppliers of: *pre-digested products rather than as independent advisers responding to the needs of a specific company*. The survey indicated that if external training provision were made relevant to SMEs' needs and delivered on-site in flexible forms, the potential impact on the success of the organisation, particularly at key stages of growth, was likely to be high.

Forms of training

Training need not follow the traditional formal model: it can take a diversity of forms, for example:

- *job rotation* to improve flexibility and enable staff to use different abilities
- *familiarisation visits* to other organisations
- *substitution* for absent staff in different sections or at more senior levels
- *shadowing* of other staff members
- *coaching or mentoring* by more senior staff members
- the establishment of *teams* to solve specific problems or meet specific production targets
- sending staff on *further education courses* on an evening or day release basis
- use of *training videos and films* (Holme, 1993).

Employees could also be encouraged to work on *individual profiles* which record their skills and achievements. This can contribute to a *personal development plan.*

Chart 14 Individual profiles

Individual profiles are important in the development of self-reliant individuals who are motivated and able to take charge of their own careers. They provide a focus for the skills of recording of achievement and action planning. They are used to assemble records of past achievement – for example qualifications, and achievements at or outside work or formal learning. In addition, profiles incorporate action plans setting out individuals' aims, how learning can help them towards those aims, and how they intend to learn.

These activities reinforce one another, providing a vehicle for lifelong learning, as follows:

Step one:	Reviewing achievement *What have I done? What are my values, attitudes, and abilities?*
Step two:	Setting personal goals *What do I want to do or achieve in future?*
Step three:	Determining learning needs *In order to progress, how do I need to develop my values, attitudes and abilities?*
Step four:	Planning for how, where and when to learn *What is the best way for me to achieve these aims?*

Profiles also provide a resource for individuals to draw on when they need to demonstrate their achievements and discuss their aims for the future – for example, in careers guidance or as part of a job application.

In order for individual profiles to be useful, they must be owned by individuals, not by employers or educational institutions. They must incorporate a broad range of achievement and be forward-looking, with future action at their heart. Profiles are most effective when integrated with high quality careers education and guidance, and the development of core skills.

Source: CBI, 'Realising the Vision: a skills passport', 1996

Developing key workers as coaches or mentors

The *development of line managers and other key workers* who can coach other employees or act as mentors, can be invaluable in smaller firms where flexibility is vital and where the impact of one under-performer can disproportionately affect organisational effectiveness.

A *mentor* supports an individual or group of workers in their job roles, helps them get to know the organisation, encourages their progress through training and generally helps them to become effective members of the work team:

> *The increasing interest in coaching and mentoring is closely allied to the concept of the learning organisation as an invaluable competitive advantage.*
>
> *The line manager's role as trainer, coach and counsellor has become important in fulfilling the challenges of today's business needs* (IPD, 1997).

Recognising on-the-job training

Informal, on-the-job training should be recognised and valued as a legitimate training method. According to the Institute of Personnel and Development (IPD), this is the way workers gain most of their knowledge about the job. However, although more than half of training is carried out in the workplace by managers, supervisors or peers demonstrating or explaining tasks and operations, many people do not realise they are being trained and the process is not organised or recorded by employers:

> *The role of on-the-job training is often overlooked. Too many companies allow on-the-job training to be carried out in a way that does not make the most of its potential, despite the fact that it can be a cost-effective resource* (Nash, 1997).

Overcoming the time problem

One of the most frequently mentioned problems in relation to training part-time and shift workers is finding time within work schedules. Some employers overcome this by providing training in the quieter times or just before working shifts begin. As one experienced training manager commented in a case study included in Section 8:

> *You have to work with the operation not against it. That's common sense but it's amazing how often it's ignored.*

Some employees may be willing to undertake a personal development process, under the guidance of an employer or manager, involving distance learning at home or attending an evening class. However, many women who work part-time have considerable domestic pressures and constraints and prefer to keep the two parts of their lives – work and the home – rigorously separated. They therefore resist training out of their working hours as it impinges on their 'home' time. For these workers, provision of training within work time may be the only solution.

Ideally the timing and location of training should be tailored to the working patterns and circumstances of employees. For those working flexibly training should be provided flexibly. Since many workers prefer the workplace as a location for training, it might include short, pre-shift training sessions or open learning at the workplace.

If conventional full-time training courses are being used, it is worth investigating whether these could be organised in shorter chunks to suit the working hours of employees. For example, could a day training course be organised in two half-days? Could a longer training programme be broken down into short units or modules enabling people to do a bit at a time?

Many education and training programmes are now divided into separate and self-contained units or 'modules' that can be taken at different times. These are more focused than longer, more expensive training programmes that have to be taken in one go. They are also easier to update and more motivating to trainees as their achievements can be identified and recorded as they go along.

Open and distance learning approaches

Short training packages that are flexible enough to meet individual training needs can assist smaller firms in developing a small number of staff with diverse working roles.

Open, distance and flexible learning are broad terms used to describe delivery systems that differ from the traditional model of tutor-led programmes offered at fixed times in special premises. The terms generally embrace:

> *... any form of learning which includes elements of flexibility which make it more accessible to learners than courses traditionally provided in centres of education and training. This flexibility arises variously from the content of the course and the way in which it is structured, the place of provision, the mode, the medium or timing of its delivery, the pace at which the learner proceeds, the forms of special support available and the types of assessment offered* (Employment Department quoted in McCollum and Calder, 1995).

Open, distance and flexible learning methods include radio- and TV-based programmes, computer programmes, teleconferencing, multi-media packages and print-based learning packages.

It is estimated that 70 per cent of firms use some form of open and flexible training methods for reasons such as appropriateness, cost, lack of other options or alternatives, and quality (McCollum and Calder, 1995).

The advantages to SMEs of using open and flexible training methods are that they can more easily be fitted into work schedules and they encourage self-directed learning by allowing employees to learn at their own pace, using a variety of media, locations and training times.

In some companies, independent learning is encouraged through providing packages such as videos and workbooks that employees complete at their own pace. To be effective, however, such packages require good quality materials, clearly defined goals, good tutor support and efficient administration. Merely providing individuals with training packages and leaving them to get on with it will not necessarily lead to better trained employees. Individuals need encouragement, support and incentives to sustain their motivation.

> *Technology-based training videos and even books can effectively teach skills but only a human being is able to relate these skills effectively to the needs of the workplace, explaining concepts and setting relevant exercises in context* (Wood, 1996–97).

> *Instructors, supervisors or line managers have a crucial role to play in supporting open learning and may need to be trained themselves in order to fulfil this role effectively* (McCollum and Calder, 1995).

One training model combines live training and open and flexible learning in communicating new concepts to employees and helping them to apply new skills to their job functions. The scheme involves an initial presentation of new concepts using a range of media. Employees are then encouraged to develop ideas using problem-solving. Finally, they are helped to relate their newly acquired skills to workplace situations. Trainers act as facilitators, encouraging staff to become effective independent learners:

> *Trainers have to recognise that adults prefer to work at their own pace and concentrate on the skills appropriate to the job. By placing the ownership of learning with the trainee and giving maximum time to the instructor's changed role, the best of technology-based training and live training can be effectively combined* (Wood, 1996).

Workbooks

Despite the increasing role of new technology in training, some training officers have found that well-structured workbooks are more familiar, less expensive, more adaptable and more effective in encouraging workers to engage in independent learning:

> *By giving each trainee their own workbook as the major training medium right at the start and not just distributing a hastily assembled set of bullet-point handouts as an after-thought, the text-based approach allows trainees to 'own' their own learning without the need for additional technology* (Wood, 1996).

Open learning facilities

Some larger companies provide open learning facilities that are open at all hours to suit the need of workers on different shifts. This is obviously not possible for smaller firms with only a few workers. However, there may be other locally situated facilities to which they can direct their employees. Some TECs and large companies, for example, have set up open learning centres which are accessible to local firms. These offer opportunities for individual study as well as customised or tailored courses for firms which cannot avail themselves of more traditional training strategies.

Women-only training

Many women workers lack confidence in their own abilities and potential. Companies wishing to increase the skills of their part-time workforce might therefore consider offering, or helping women to attend, some single sex training programmes to help build their confidence as well as general knowledge and expertise. Single sex provision is a legal possibility allowed for under provisions of the Sex Discrimination Act. According to Section 47 of the Sex Discrimination Act (amended in 1986) it is legal to provide single sex training in cases where one sex or the other has been strongly under-represented in a particular working area, and for people who have not been in regular full-time employment because of domestic or family responsibilities.

Investors in People (IIP)

> *The ideas behind Investors in People work equally well for a company with 10 employees or a company with thousands* (Davie, 1997).

Investors in People is the national quality standard which provides companies with a framework for improving their performance and competitiveness. To achieve the award, employers are required to follow a process based on four principles: a commitment to developing all employees as part of achieving business goals and targets; regular reviews of employees' training and development needs; action to train individuals both at the recruitment stage and throughout their employment, and regular evaluation of training to assess achievement and improve future effectiveness.

Accreditation as an Investor in People lasts for three years after which the organisation is reassessed to ensure that the standard is being maintained. TECs will advise organisations on how to achieve the IIP award and support them during the process.

Almost 25 per cent of the UK's workforce are in an organisation which has achieved or is committed to achieving the standard.

Some employers have identified the Investors in People award as the spur they needed to train their flexible workers (CBI, 1994). Others have reported increased productivity and profits after going through the process. In research conducted by the Institute of Employment Studies, 60 per cent of recognised Investors in People employers claimed that the process had made a positive contribution to their business performance.

> *During the 1990s it became clear that IIP was a major stepping stone in the journey for genuine excellence and high performance standards. The standard reinforces core values, underpins an organisation's mission and helps staff focus their efforts on meeting a business's strategic objectives.*

> *Throughout this process, what has become clear is that people contribute more when they understand the aims of a business, their role within it and the skill and knowledge they need as individuals. As a result, more companies are beginning to understand that the development of the workforce is just as important as any other business development* (Davie, 1997).

In practical terms, IIP allows an organisation to:

- develop its people
- link individual priorities to a business plan
- provide training based on results not academic theory
- provide a framework for regular appraisals which allow training to be adjusted and modified.

> *The great strength of IIP is that it creates a quality culture within an organisation where everybody understands their role and how they can contribute to the company's strategic objectives* (Davie, 1997).

Chart 15 Investors in People

What are the returns for your company from investing in people? First, you will be matching the competition which is exactly where any business wants to be. No-one can afford to be an also-ran in Britain's skills revolution. Secondly, Investors in People will have that extra edge in gaining new customers that comes from having the stamp of a quality workforce. Can you afford to miss out on this business? Thirdly, Investors in People will be attracting and retaining top employees who are increasingly asking questions about the training and development on offer. This is the best way to reduce the threat and damage of poaching. Finally you will be building your business for the future, starting with your most important asset, your workforce. Ignore it in the 90s at your peril.

So what is an Investor in People? A company that makes a public commitment to training, that has regular reviews of need, that continually develops its workforce and that evaluates for the future. The Investor in People campaign will dominate training in 1991, run through all TECs. They will help all businesses gain the competitive advantage Britain needs in the 1990s.

Source: CBI (undated), Investors in People training seminars

Employee Development (ED) Schemes

Since a major obstacle to training in SMEs is the difficulty of releasing workers during worktime, schemes which encourage workers to learn in their own time have particular advantages.

Employee development programmes which can be taken in one's own time and which respond to individual learning interests have been found to be a very effective means of encouraging and facilitating workplace learning. In such schemes, employees are entitled to participate in a learning programme of their choice up to a certain sum a year. Programmes can be provided locally or in the workplace (arranged in partnership with local providers).

In 1996 there were about 600 Employee Development schemes in operation in Britain. These focus on the personal development of employees and are generally broader than job-specific training. They respond to employees' learning choices and workers (or their representatives) are involved in the planning, development and administration of the programme.

Although the learning undertaken through ED schemes need not be related to the job there is evidence that participation can have positive employment spin-offs both for individuals and for the company. Many schemes have provided learning opportunities for sections of the workforce previously excluded from training, especially those with limited previous formal education experience (University of Leeds, 1993). An evaluation of schemes conducted for the Department for Education and Employment (DfEE, 1996) indicated that a large proportion of participants in over 450 schemes had left school at age 16 or earlier. ED schemes therefore often provide a good way of bringing unskilled or semi-skilled workers back into education. The evaluation further showed that participation frequently results in increased self-confidence and more positive attitudes towards learning.

A number of other benefits have been identified by individual enterprises. Because the schemes are seen as something offered by the employer, workers react positively and this encourages more positive attitudes towards the organisation.

Companies have also found that participation improves communication skills at work and helps workers to handle change effectively, to work more flexibly and to reach higher standards of productivity, efficiency and customer service:

> *In some ways employee development can be seen as the "sweetener on the pill" of changing work practices. One Chemicals firm had introduced a complex new shift system which allowed one day's training per six weeks work. ED makes business sense, which is why firms are adopting it* (University of Leeds, 1993).

At a celebration of schemes co-ordinated by Heart of England TEC (December 1996), a representative from a local grocery retail branch where the vast majority of staff are part-time claimed that the scheme had made employees more motivated and contented and had generally improved staff morale.

At the same event a representative of a small firm reported that participating made employees more committed to the company and more open to training: 'it makes you think that your employer is interested in you as a person' (Celebration of Employee Development Scheme, Heart of England TEC, 1996).

Many organisations have discovered that employee development schemes can achieve a different but complementary effect to normal job-related training by creating a culture of learning, and enhancing the image of training. Employee development schemes also interact favourably with other employee training initiatives such as IIP (DfEE, 1996).

An evaluation of schemes in three TEC areas found that:

- the majority of participants planned to do more training after finishing their current course regardless of their level of prior qualification
- 50 per cent of participants considered that the company acquired new skills or knowledge from them as employees
- nearly 50 per cent felt more able to tackle challenges and problems that arose at work
- 60 per cent were more open to new ideas
- 33 per cent were more concerned about quality in their work
- over 33 per cent felt they could take on a greater variety of work tasks
- 33 per cent thought they were more productive at work
- 40 per cent were more likely to think that the company treated its employees reasonably (DfEE, 1996).

The features of employee development schemes that lead to such favourable outcomes have been identified as:

- wide freedom of choice in the subject or activity pursued
- fees covered by the employer or TEC
- convenience of timing/location
- solidarity with fellow students
- some workplace delivery of learning programmes
- employer recognition of employee as 'a wider person' (DfEE, 1996).

Costs of Setting Up an Employee Development Scheme

It is clear that smaller firms would need financial support to mount such schemes. However, there are a number of existing models which receive assistance from TEC development funds and other sources such as local Economic Development Units. Most also involve collaborative arrangements with education providers such as colleges, universities, TECs and local authorities.

Some collaborative ED schemes have been set up by TECs specifically to help smaller firms and there are also consortia of smaller enterprises which have worked together to run joint schemes.

Collaborative training schemes

Small workplaces with only a few employees could find it helpful and cost-effective to team up with other organisations in the same sector in seeking training and development for their workers. For example, it was suggested at a seminar held for this project at Hertfordshire TEC that doctors' surgeries which may have similar organisational and customer service training needs might group together and obtain customised training help from the local TEC or other training agencies.

Accreditation of training

If possible and appropriate, employee training should lead to recognised accreditation.

National Vocational Qualifications (NVQs) cover a wide range of occupational areas and can be obtained in a variety of training situations. They offer a link with other qualifications and include communication, numerical and IT skills as well as some aspects of personal effectiveness. Competencies gained outside the workplace can be recognised.

In October 1996, over 40 per cent of medium and large employers were offering NVQs to their staff, an increase of two-thirds in two years.

NVQs have been most successfully implemented in companies where:

- there is full commitment to them from managers
- they have been introduced gradually, following full consultation with workers or their representatives
- they are used as the framework for all company training
- the benefits are made clear to employees
- there is company encouragement and support for employees undertaking NVQs and regular visits from assessors.

> *Workers in organisations where NVQs have become integral to in-house training are generally enthusiastic and see the qualification as a means to a better job* (McGivney 1994).

Evaluation of Training and Development Activities

Effective training should make a visible difference. It should have an impact on the work performance of employees and, therefore, on the effectiveness and productivity of the organisation. This can be assessed by regular monitoring and evaluation.

Skelland (1997) has comprehensively detailed the aims and methods of evaluating training:

> *All training and development activities, whether on- or off-the-job should be measured for their effectiveness. To do so we should ask searching questions like: did the activity meet the requirements of the trainee, the line manager and the business? Have the knowledge and skills acquired been used and had a positive impact on performance? From this, one can see that evaluation is much more than the completion of a 'happy sheet' at the end of a course.*
>
> *The emphasis should be on changes – improvements – in performance. And the most effective way to measure this is to set objectives ... Objectives or targets can be set for individuals, teams or the organisation, or all three. The focus, therefore, should be on outcomes: those aspects that will have an impact on the business as a result of the investment in people, such as:*
>
> - *increased productivity*
> - *reductions in waste*
> - *improvements in quality*
> - *increased customer satisfaction, repeat business and referrals*
> - *increased sales*
> - *improvement in converting enquiries into customers.*
>
> *Setting objectives and then evaluating performance against their achievement is the responsibility of everybody – trainers, financial specialists, employees, line managers and senior managers.*
>
> *The prime responsibility of employees is to say whether the developmental activity was useful, well delivered and met expectations. Line managers should assume responsibility for evaluating progress against training and development targets and the value of the investment. This means concentrating on evaluating outcomes – the impact the development activity has had on the individual, the team and even the business.*
>
> *The prime focus of senior managers should be on pulling together all the strands of evaluation in order to address the central questions: what does our organisation get from its investment in people and is this the most we can get from our investment? They should not consider costs alone nor should they concern themselves with training in isolation. They should also look at such things as:*
>
> - *quality strategies*
> - *effective employee communication*
> - *employee commitment*

> - *wider development activity including manager competencies*
> - *customer expectations and perceptions*
> - *competitors' activities.*
>
> *Most important, they should ensure that effective action is taken on the basis of the evaluation. If the business is not getting a return on its investment, they should take a long hard look at why, learn from the evaluation, set fresh objectives and renew and refresh commitment and action throughout the organisation.*
>
> *To evaluate training and development truly effectively, action must take place before, during and after an activity. In the ideal situation everyone will be continuously learning from their successes and failures.*
>
> *If nothing else we should:*
>
> - *set objectives at all levels and for all key activities, with performance measured and reviewed against these targets*
> - *conduct top-level reviews which do not look solely at budgets and spending but at what people and the organisation are achieving and what they need to do to achieve, compete and grow*
> - *introduce simple record keeping, for example of performance and development discussions between managers and employees so that meaningful reviews can take place*
> - *conduct ongoing surveys of specific activities, showing improvements or performance against an objective. Staff and customer surveys can be particularly valuable, as they can ensure that senior management don't just hear what they want to hear.*

To illustrate these points, Skelland quotes a recruitment firm which had achieved the Investors in People award. As a result of continuously evaluating the impact of training, their profitability increased by 30 per cent, productivity by eight per cent, permanent placings by 49 per cent, revenue from temps by 19 per cent and new business through referrals by 12 per cent.

Chart 16 The Evaluation Cycle

Target Setting should be the first point in the evaluation process. Targets put business objectives in a form in which they can be easily evaluated. Ideally they should be in outcome and competence terms. They can be framed as vocational qualifications, units or modules. Targets need not focus only on skills but can reflect other business needs such as:

Productivity
Lower unit costs
Task completion
Output quality
Reduced wastage
Sales volumes
Reduced downtime
Lower accident rates
Innovation rates

Credible Measurement Techniques are essential if evaluation is to have any impact. Targets should always be quantifiable and procedures for measuring them should be as rigorous as possible. Diaries and interviews can be used and all skills should be assessed, ideally in conditions which reflect actual practice in the workplace or in the workplace itself. Measurement should always be of an observable activity or process. For example most sales jobs involve a variety of skills such as 'demonstrating products' and 'responding to customer complaints'. Using more general terms, such as 'attitude to cutomers', would be unhelpful in an evaluative context.

Perceiving Workplace Change – When the tools described above are applied during the training process tangible changes in the workplace should be perceived. These may be difficult to detect if there is no clear indication of the type of change that is being looked for. If no change is evident then something is clearly wrong with the training or the perception of need.

Communication of the Results – Making the results known to those who need to know can allow improvements to be built into future processes and targets. Line managers will want to know results – particularly where they themselves have identified the need the training was designed to meet.

Individuals themselves will also want to be informed and within the action planning process regular opportunities need to be built in for review and for assessment of progress.

Completing the Cycle – The evaluation cycle is only complete when achievements have been assessed against targets. Decisions will then have to be made on new objectives and new targets to set.

For more information on the evaluation process see 'Evaluating your Training – Matching Outcomes to Needs' available from CBI Publications.

Source: CBI (undated), Investors in People training seminars

Meeting the Costs

All this suggests that employers need to see training not as a cost but as an investment. Although the costs of training are often regarded as a significant deterrent, some studies suggest that few companies have systematic methods for assessing the costs and benefits of their training activities.

Expenditure on training can be broken down into different categories as shown in Chart 17.

Chart 17 Budgeting Training

Whether training is taking place on-the-job, in the workplace, or off-the-job, in a college or with a provider, it should be budgeted. Expenditure can be broken down into various categories:

Provision Costs – This includes course costs, the costs of development, administration and any additional costs such as assessment and certification fees for qualifications. The costs of materials may also need to be included, whether it is software for open learning or simply printed handouts.

Capital and Running Costs – This includes hire and purchase costs for equipment and premises and ground rent; heating and other bills should also be included.

Wage and Labour Costs – This includes the wage costs of trainers and trainees, a more meaningful definition than trying to measure the value of lost production.

Travel and accommodation – This includes any costs directly connected to the provision of training.

Other costs – Such as subscriptions to training organisations, databases or other services.

More detailed information on the costs of training and ways of calculating it are included in 'Training in Britain', HMSO 1989.

Source: CBI (undated), Investors in People training seminars

Some ways of meeting costs could be through:

- including training costs in tenders
- collaborating with other organisations in order to share training costs, e.g. employers could group together to block-buy training
- investigating whether any larger firms in the area offer smaller firms access to their training facilities
- investigating whether the local TEC has set up forms of local training delivery or whether it would be prepared to establish or support a scheme enabling SMEs to share the costs of training
- informing employees about tax relief and career development loans for vocational training undertaken at own cost
- investigating flexible training methods.

Some General Guidelines

Since SMEs are so diverse, training strategies will need to meet their individual requirements. However, there are some general guidelines that are worth taking into consideration:

- effective training policies require strong management commitment which is reflected in policy and practice
- training needs should be considered in a whole organisation context
- training needs to be planned for the long term rather than being provided as an ad hoc reaction to immediate crises and problems such as skills shortages
- preliminary audits such as the collection of workforce data and asking employees to identify their own skill needs can:
    - reveal problems such as staff under-performance and skill deficits
    - indicate what is required to make quality improvements and organisational change
    - provide baseline data for assessing progress towards production targets
- training is often most effective when organised collaboratively by employers, unions, TECs and other training providers. *According to one study of SMEs, the most successful small firms are characterised not only by product or process innovation but also by their involvement in collaborative partnerships* (Hughes, 1997).
- involving employees in decisions about training can positively affect attitudes to training and organisational change
- it is important to develop trainers and 'key' workers as they have a crucial role in developing technical and job-specific skills and conveying messages about the value of taking up other training or general education opportunities.
- training is most effective when it values and builds on existing strengths and achievements, recognises transferable skills and increases employee confidence
- assessment of prior learning and competencies acquired outside the workplace is now part of national vocational qualifications (NVQs/SVQs) and is particularly useful to women workers who have been obliged to take career breaks for family reasons
- the impact of training needs to be regularly monitored and evaluated
- it is valuable for the workforce to feel part of a team and that their role in the organisation and their suggestions are valued. Regular meetings to pool ideas and experience can significantly increase employee morale and commitment.

Some Questions for Employers

Has the organisation conducted a training needs analysis?

Is staff training linked to organisational goals?

Does the organisation have an annual plan for employee development?

Is training the result of advanced planning or is it a short-term response to immediate requirements such as production pressures, changes within the organisation or new legislation?

Are employees consulted about their own training needs and how they think their skills might be developed to help them in their work roles?

Are part-time and other flexible workers included in company-wide reviews of training needs?

Has the organisation investigated the possibilities of using Open and Distance Learning methods to train flexible workers?

Has the organisation investigated how the local TEC or other organisations (such as Industrial Training Organisations) might advise or assist in training employees?

Has the organisation investigated whether there are any local employer networks or collaborative training schemes it could join?

Has the organisation considered becoming an 'Investor in People' organisation?

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7 Motivating Employees to Train

Even Nelly has to learn (small employer at training event organised for this project).

Because of changes in legislation or technology, organisations are sometimes obliged to upgrade the skills of their staff and in some sectors workers are increasingly expected to take responsibility for their own skills training and development. However, some workers may be reluctant to undertake training. For example, some long-established employees who have been working without benefit of training may not see the need to train or change their practices.

Others may be resistant to undertaking any training programmes that are not offered by the employer in the workplace.

To overcome their resistance, employees need some encouragement and incentives. They also require any obstacles to their participation to be removed.

The main deterrents to undertaking training identified by part-time and other flexible workers are:

- *little training available other than for the immediate job*
- *no progression prospects or other advantages attached to training*
- *lack of time outside working hours to undertake training*
- *having to pay for one's own training and qualifications*
- *the problem of finding and paying for alternative care for children when training is undertaken in one's own time*

(McGivney 1994).

It should not be assumed that because workers do not mention the problems they face in undertaking training that they do not have any. As seen earlier, participating in training outside working hours is often difficult for women employees. One woman who was working part-time told this project that she had been encouraged to upskill herself in her own time by her employer. She received no concrete help or incentive to do so, although the firm prides itself on developing its workers. She was obliged to work towards a qualification in the evenings which she found very difficult as her family resented her spending time on matters unconnected with them while she was at home. Her only solution was stay up and study late at night which affected her alertness at work.

Employer encouragement

Survey findings consistently show that the vast majority of employees who are active learners have employers or managers who actively encourage them to learn about the job and how to do it better or who supported their participation in external education or training schemes (SCPR, 1994).

Employee development schemes such as those mentioned in Section 6 have demonstrated that a particularly effective way of getting people to acquire the habit of learning is to help them financially to undertake education or training courses of their own choice. At an event to celebrate the scheme run by Heart of England TEC in 1996, it was claimed by owners and managers of several SMEs that the majority of employees would *not* have participated had it not been for the encouragement they had provided:

> *We give them a little push. It makes them realise what they're capable of.*
>
> *We did it to create a learning culture; to give something back to staff and to enhance morale.*
>
> *In smaller firms: 'the attitude of the owner/manager is often the single most critical determinant of the level of (employee) participation (in development schemes)'* (DfEE, 1996).

Employer attitudes to training are inevitably influenced by their own exposure to it:

> *Managers/owners who were professionally trained ran their companies in a different way from those without that training* (Lane, 1994).

As the case study 'Squeaky Clean' in Section 8 suggests, employers and managers who have undertaken effective training themselves are the most likely to make training available for their workers.

Employer attitudes have a particularly decisive influence on flexible workers' motivation to train (CBI, 1994). One of the problems frequently identified by part-time workers is that they are regarded as second-class citizens and therefore receive little encouragement to upskill themselves (McGivney, 1994). It is frequently found that workers who have received little or no formal training from their employers, and no encouragement to learn in their own time, neither want nor expect to receive training:

> *The lack of exposure of members of lower occupational groups to training at work appears to result in their capacity to envisage participation in training being blunted* (Rigg, 1989).

On the other hand:

> *An environment that encourages training and places high value on training is likely to foster an intrinsic reward orientation thereby encouraging individuals to consider taking part in training for their own personal development.*
>
> *Extrinsic rewards in the form of supervisor support or promotional opportunities may also encourage employees to consider becoming involved in training programmes* (Crowder and Pupynin, 1993).

Incentives to Train

Motivation to undertake training is strongly influenced by workers' assessment of its value. For many part-time workers and those working shifts there may be little incentive to undertake training that is not compulsory and offered in the workplace and in working hours, unless it is firmly linked to pay or promotion opportunities and unless there is financial support for training undertaken in own time and strong encouragement from employers. They may not see the point of training if it does not have any recognisable benefits.

Even if training does not lead to improved pay or promotion, the offer of training can suggest that employers value staff and their contribution to the company. It has been found that involving staff, even those at the lowest organisational levels, in decision-making; discussing with them the organisation's goals and targets and how they can be met through training; listening to their opinions (e.g. through regular team meetings) and generally showing an interest in their performance, increases employees' feelings of self esteem and make them feel they are valued by the organisation. In one of the companies referred to in Section 8 (S.V. Salads) this approach has significantly reduced staff turnover and absenteeism. Other case studies in Section 8 demonstrate that asking employees to identify their own training needs and preferences and involving them in decisions about training increases their willingness to participate. The negotiated approach also improves staff commitment and loyalty by indicating that their input is valued and acted upon.

Audits of skills and recognition of skills acquired outside the workplace can hugely improve worker confidence and morale. This is particularly true of women who tend to undervalue their skills and experience.

A company which values its staff develops a culture that encourages high performance. One retail firm with a large proportion of part-time employees follows certain guidelines to ensure that they receive fair treatment (Chart 18):

Chart 18 Lessons for Employers on Managing Part-timers/Contract Workers – the Sainsbury's Experience

1. **Harmonise the conditions people work under.**
2. **Provide training/induction for everybody. This should include induction to the culture of the organisation.**
3. **Have standards that promote equality of treatment (e.g. advertise all jobs).**
4. **Involve fully with rest of team (e.g. attending team meetings, involve in 360 degree appraisal).**
5. **Recognise prior learning and experience (including non-work activities).**
6. **Recognise and value the economic importance of part-timers and contract employees to the organisation.**
7. **Provide opportunities to acquire skills and receive careers advice (e.g. The Sainsbury's Choices programme).**
8. **Involve socially with rest of team.**

Source: Opportunity 2000 (1995), 'Towards 2000; a workplace agenda for the next half decade'.

Peer pressure

If a certain number of workers become voluntarily involved in training or education programmes it is likely that others will follow their example. In one small firm involved in the Heart of England Employee Development Scheme, it was found that workers who had not taken up the opportunity to participate were embarrassed into doing so because so many of their colleagues were involved. Similarly, participation in the Kent TEC Employee Development scheme for small firms 'accelerated' once the first few workers had started learning.

Conversely, in organisations where workers have not been provided with any learning opportunities, a non-learning culture is often created which is difficult to break down.

Providing programmes in work locations and in working time

Employers who wish to encourage a learning culture in their organisation but do not have the resources to do so on a large scale may find that it is worth investing in some initial training provision. The experience of participating in learning opportunities in the workplace and in working hours often motivates employees to continue learning in their own time. After residential staff at Oxford Brookes University had been offered the opportunity to undertake learning programmes in the workplace (see Section 8), a majority subsequently went on learning in their own time. Similar results have been reported by employee development schemes.

Providing information on external training opportunities and Vocational Training Relief

Employer encouragement can also take the form of providing workers with information on external education and training provision and helping them to plan a personal training route.

Employers could also make workers aware of the tax exemptions available on work-related training undertaken at their own cost. (It has been suggested, however, that flexible workers who change jobs frequently would be more likely to seek tax relief if it was available for achieving units of NVQs rather than full NVQs.)

Summary of Key Points

In short, increased participation in training can be achieved when:

- companies send employees very clear signals that training is important and will have benefits
- employers actively encourage employees to acquire training and development, through, for example, the Investors in People programme
- part-time workers are offered the same access to training as full-time workers
- flexible workers are offered training during their working hours or, where that is not possible, are given some help and support to train in their own time
- there is continuing guidance and support for employees using open and distance training packages
- employees are offered the opportunity to work towards a nationally recognised qualification
- completion of training programmes, NVQs or other qualifications is related to pay and promotion structures
- the skills acquired through unpaid work are accredited towards NVQs or other awards
- participation in learning that is not specifically job-related is also encouraged
- employees are given information on other education and training opportunities and the tax relief available if they undertake training at their own cost.

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Some Questions for Employers

What encouragement and incentives are there for workers to undertake training in your organisation?

To what extent do you encourage staff to undertake training and development in their own time?

Do you advise employees on planning a personal career plan?

Do you have information about external education and training opportunities available in the workplace?

Do you support workers in following external training courses related to their career plans?

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8 Examples of Good Practice

SMEs Which Have Adopted Effective Training Strategies for all their Workers

(N.B. Not all the companies referred to below have been identified by name in the source materials)

Squeaky Clean is a small, owner-managed, contract cleaning firm in Hertfordshire employing part-time workers of both sexes on average for 10 hours a week. The owner who had always trained staff himself began to experience staffing problems when the business started to expand. The main problems he encountered were that the staff were not flexible in their attitudes and not willing to take on extra work when it came in. He decided at this point that he needed to rethink the training he was offering which up to now had been largely based on his own perception of training needs.

At the local TEC he found out about a Skills for Small Businesses course leading to NVQ Level 4 and registered for the course together with representatives of seven other small local businesses. The course focused his mind on how to develop both the business and the workforce:

> *It identified with each participating company where they were and where they wanted to get to; what their objectives were. Mine changed every day! I got a lot out of the course. For the first time in six years I did a client satisfaction survey. Before that I thought that everybody was happy because the phone didn't ring. From the survey I discovered that in 10 per cent of cases there was a problem! Now, for every job we have a checklist.*

The owner still does most of the training himself with the help of another staff member. However, his approach has become more thorough and proactive:

> *Training is the only way of making sure that all your workers are working towards the same standards. I now do a training needs analysis leading to a training plan. This incorporates items from the checklist and from the client survey. A lot can be done in-house and we talk to workers about their job. If workers on the ground floor are managing themselves you don't need line managers. As a result of the course I have also produced an employee handbook.*

The owner has identified a number of positive results from the new approach to training – including increased business, improved staff morale and recruitment:

> *To me this has been the biggest step forward in six years. The cleaners' morale is now sky high. They appreciate our commitment to them and all have become more efficient.*

> *Workers are now offering to work extra time and take on new jobs. They also now make suggestions about service improvements.*
>
> *The business is now very well known and people are ringing up to apply for jobs with the company. The profile of the company has also shot up among client groups. We have improved the quality of service to our clients.*

In addition to the new stress on training, the owner has introduced an incentive scheme to motivate workers. This is a system of profit sharing according to which employees are remunerated for recommending new clients, working without client complaints and finding new recruits.

As a result of all these measures the quality of employees' work has improved and they strive to get clients to recommend the business to other organisations:

> *We've picked up about £80,000 new business from this so far this year.*

The company has expanded from 25 workers to nearly 50 and is now considering following the Investors in People process and offering NVQs to all employees. It is also considering using client companies as training schools (offering them a reduced price).

(Presentation from owner manager at joint NIACE/Hertfordshire TEC event,
21 March 1997)

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S.V. Salads Ltd, originally a small consortium of cucumber growers, has expanded 'phenomenally' to become an important supplier of fresh produce to major supermarket chains. It now employs approximately 120 people.

The company's expansion accelerated with the growth of supermarkets and in the last eight to nine years turnover has leapt from £5 million to £30 million. Such rapid change has gone hand in hand with a major culture change within what was originally a small, hands-on company. A crucial component of this has been a new approach to the development and training of staff.

When the company began to 'burst at the seams' in the early 1990s, a consultant from the Department of Trade and Industry suggested that the new market situation and increased customer demand might be best managed by recruiting a personnel officer and investing in training and development. A full-time personnel manager was subsequently appointed on a short-term contract in 1993. This post was converted to a part-time one nine months later although both the new incumbent and her predecessor realised that the job and its responsibilities were likely to expand rapidly.

The current postholder adopted a proactive top-down approach to training, starting with directors and managers, none of whom had previously received any formal management training. She began by demonstrating different ways of managing people. She found company directors very open and receptive to a subtle mentoring approach and eager to acquire new skills to improve the business. She then organised four-day external training courses for different levels of management during the quieter autumn and winter periods:

> *I worked though the whole of senior management and supervisory levels and team leaders. Now they've all had some external training.*

In order to ensure efficient production and meet increasing customer demands for quality, workplace training was introduced for employees such as production workers and packers who had in the past been expected to pick up skills on the job:

> *We can't get away with a casual approach to staff development any longer because of competition and the expectations of our customers. Customer specifications have to be followed. Complying with customer demands is vital and supermarkets are constantly raising their standards. Quality controls are getting stronger. Our packers have to act as quality controllers and check the quality of produce when packing. If anything slips through the net it starts with the packer. That's the bottom line.*

All employees are now presented with the company Vision Statement to make them aware of company goals and standards. New workers receive induction and a staff handbook and a training manual has been produced for production staff which they follow under the supervision of supervisors and team leaders. In addition, all team leaders and production managers have attended a food handling course. Team leader training is conducted during the quietest time of the week:

> *When I suggested having all team leaders on a training course there was some consternation. But we did it at the quietest time. You don't push against the operation, you work with it.*

A business which involves the buying and selling of fresh produce is inevitably dynamic and volatile since prices are constantly rising and falling. All training therefore has to be cost-effective and strongly relevant to company needs:

> *We are a bottom-line company with small profit margins and everything has to have an impact on the bottom line.*

The new training measures have opened up opportunities for workers who wish to progress within the company. For example, to deal with a shortage of people with fork-lift operation skills, workers are given opportunities to train in this area and this gives them an added skill to add to their existing knowledge of the company.

To provide cover for workers who are absent for training, sickness or other reasons, a 'contingency' structure has been introduced whereby some employees are trained to deputise 'upwards' for people working at more senior levels and in other technical areas. This has created greater flexibility in working practices: the employees concerned acquire new skills and some who have been trained as deputies have subsequently been promoted.

Recruitment policies and methods have also been changed. Whereas in the past anybody could turn up and ask for a job, now all vacancies are advertised at the Job Centre and candidates are required to go through a proper recruitment procedure involving application forms and interviews. This has raised the overall standard of salad packers.

Since some of the workers recruited have no qualifications, little self-esteem and few career aspirations, attempts are made to motivate and encourage all employees to feel that they are members of a working team whose efforts and opinions are valued. Regular team briefings have been introduced in the last year and team leaders have been given managerial recognition. These measures raise workers' sense of their value and status in the company and increase their self-esteem and commitment to the company. This has had a marked impact on absenteeism and staff turnover both of which are significantly lower than in the past.

All these developments have significantly changed the company culture and in order to build on this in a more structured way and in line with a Business Plan, the company is now going through the Investors in People process. They are also planning to link training with national vocational qualifications in the future.

(Source: interview with Personnel Manager, 13 May 1997)

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A very successful print-based company in the North of England which now has 47 workers has a strategy of employing unskilled staff and training them to do specific jobs. The company conducts a wide range of training both on- and off-the-job, using both internal and external trainers. It uses the most appropriate means of training for the job and individuals concerned.

The policy of fitting the person to the job rather than fitting the job to an individual's set of skills has meant that the company has not experienced any serious skills shortages. Training has played a central role in its success and has been a means of fulfilling its strategic aims.

Managers would now like external grant support to help them develop new areas of business through training or better marketing knowledge.

(Source: Lane, D. A. (Ed.), (1994) 'People Management in Small and Medium-Sized Enterprises', *Issues in People Management*, Series 8, Wimbledon, Institute of Personnel and Development)

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Deans, a London firm supplying blinds and awnings, was forced to cut staff after two bad years of trading. At the time it had few training resources and its previous training efforts had been ad hoc and not very effective. However, the need to maintain and improve the skills of the remaining staff was recognised and a number of training initiatives were consequently put in place.

First, the company set up a mentoring scheme under which all employees could share their skills with colleagues. In doing this it worked with the local TEC, AZTEC. The TEC provided a personnel consultant who worked with the firm for three or four days per month at 'very reasonable cost'. This helped the firm to establish formal procedures such as appraisal against objectives to discover training needs and to see how people benefited from the training they received.

As there were no national standards in the industry or formal training covering installers of blinds, Deans asked the British Blinds and Shutters Association to finance a pilot project for the industry. This resulted in the creation of a new training scheme validated by City and Guilds.

The result of the company's new proactivity on training was a significant business turnaround and increase in trading the following year: 'the training system allowed us to achieve more with fewer people.'

(Source: McGill, P. (1994) 'Investing in People Power', Employment Matters,
The Guardian, 22 October)

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After experiencing a number of difficulties during the recession, a foundry company employing 75 people in the North of England recognised that some of the problems were related to inadequate managerial skills. A personnel officer was consequently appointed to act as recruitment officer, trouble-shooter, employee relations manager and administrator. A new training programme was then put in place to achieve strategic aims and tackle identified skills shortages.

The company now believes that adequate training is essential to enable staff to perform to the expected level and deliver the results required. Other benefits of the new training policy are that health and safety risks have been minimised and staff feel more valued by the company.

(Source: Lane, D. A. (Ed.), (1994) 'People Management in Small and Medium-Sized
Enterprises', *Issues in People Management*, Series 8,
Wimbledon, Institute of Personnel and Development)

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A distribution company which grew from 50 employees in its first three years of operation to over 300 workers is now considered the most successful business in its sector. Its success is attributed to tight budgetary control, the hiring of good staff and provision of appropriate and quality training.

The training is designed to ensure that the skills base of the staff matches the skill needs required to achieve company targets. The first section of the annual operating plan is therefore devoted to staff development. A new, proactive personnel policy has influenced the company in its location decisions. It has relocated to its current base specifically because the local skills base is relevant to its needs.

(Source: Lane, D. A. (Ed.), (1994) 'People Management in Small and Medium-Sized
Enterprises', *Issues in People Management*, Series 8,
Wimbledon, Institute of Personnel and Development)

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A graphic design company based in the North West has been commended for quality of service, customer care and attention to detail in complying with client requirements. A major factor identified as contributing to this achievement is the quality of staff. People are seen as the key to business success and despite suffering severe problems during the recession, the company made the decision not to make anyone redundant because of the effect this would have had on the remaining staff. There is also a flat management structure: most employees are expected to contribute to aspects of management and all have a say in decision-making.

The company has a flexible business plan which, because of the size of the company and nature of the sector, changes year by year. Training is seen as a vital part of company strategy. It is described as the vehicle that enables the company 'to get to where it wants to go and stay afloat' in a competitive world. It is also seen as a means of demonstrating commitment to the staff and their development.

Most training is technical, IT-based and conducted in-house. When time permits, staff are also encouraged to attend relevant courses and conferences. There is an annual appraisal system with which the company is not yet entirely satisfied. This process does incorporate staff appraisal of the company which the director feels is the correct balance. The appraisal looks at work roles, how employees think their work has progressed and how they feel the company is treating them. At a weekly meeting on Mondays all members of staff review jobs so that everyone knows what work is being undertaken. A group training session has also been initiated for Friday afternoons.

The company strives after quality. It has registered as an NVQ accredited centre and is working towards Investors in People and BS5750.

(Source: Lane, D. A, (Ed) 1994, 'People Management in Small and Medium-Sized Enterprises', *Issues in People Management*, Series 8, Wimbledon, Institute of Personnel and Development)

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The success of a technical engineering company in the Midlands with a workforce of 97 has been attributed to the quality of training offered to staff.

The company believes that quality and training are inseparable and offers all staff a range of both on-the-job and external training opportunities. It also supports individuals taking Higher National Diplomas and management qualifications as well as technicians training to become quality engineers. The company also runs an apprenticeship scheme offering in-house vocational craft training to specific levels.

Workers are regularly surveyed about the training they would like or feel they need. Every effort is then made to provide that training or development. Involving the staff in decisions about their own training leads to increased willingness to participate in training as well as improving motivation by demonstrating to staff that their input is valued and acted upon.

Part of the company's training policy is based on mentoring. Managers believe that when employees undertake a course of study or training, they can pass on the benefits of their increased knowledge and skills to their immediate colleagues. This is one way in which the company deals with skills shortages. For example, all members of the computer-aided design department have been trained in-house through a comprehensive mentoring system.

The main constraint on company growth has been lack of applicants with the appropriate technical skills and expertise. The company has found that few individuals are willing or able to enter the craft industries and most lack even the most basic craft skills. Training has been found to be the most effective means of tackling technical skills shortages although this has been found to be an expensive solution. The company feels that government should make financial incentives available to help smaller firms invest in training as it is fundamental to their business success. Managers would like to see a return to the former apprenticeship schemes the elimination of which, they believe, has led to the erosion of the skills base of British manufacturing industry.

(Source: Lane, D. A. (Ed.), (1994) 'People Management in Small and Medium-Sized Enterprises', *Issues in People Management*, Series 8, Wimbledon, Institute of Personnel and Development)

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Multi-skilling

In order to improve efficiency and cut costs, *Dista Products*, a medium-sized subsidiary of an American pharmaceutical manufacturer based in Merseyside, went through a process of major restructuring and laying off staff. This meant that remaining staff had to learn a range of new skills to help them take over some of the functions that had previously been covered by specialist staff. The company approached Halton College of Further Education to help them draft new job descriptions and identify new skills to enable staff to take on wider duties. In collaboration with the company the college is also designing a new teaching curriculum based on specific job roles.

The training is closely tailored to Dista Products' business needs. Each programme is unique to a particular job and designed to match up with relevant parts of an NVQ. According to the human resources team leader, NVQ assessment verifies that employees are competent to do the task and also enhances their employability:

> *You are enhancing the market value of employees. Companies cannot offer cradle to grave employment but they can train people to make them employable.*

The human resources team leader would like NVQs to be further developed so that they offer more 'pick and mix' possibilities and enable multi skilling:

> *Every job is changing, A secretary may need to know about production planning skills and more administration. We need pick and mix relevant training to support all the different strands of each job.*

(Source: *Times Educational Supplement*, 2 May 1997)

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Basic Skills for Part-time and Lower Skilled Workers

In 1996, a pilot skills training project was conducted at Oxford Brookes University to improve the skills of residential services staff (cleaners, porters and catering staff) – many of whom were women aged 40–60 working part-time, often in two part-time jobs.

The project started with a training needs survey involving all staff including managers. This took the form of confidential interviews in the course of which staff were invited to take up a learning programme. Of those interviewed, 67 per cent expressed a desire to improve spelling or writing; to try something new (such as computing); to develop an interest; to help with a specific problem (such as metric conversion); to further develop a skill or to prepare for further education.

Fifty per cent of residential services staff subsequently joined a variety of learning programmes that were provided in their worktime and an open learning centre was set up for their use. Those who did not participate considered themselves too old to learn or felt that the offer had come too late in their career. Some felt they had too many personal commitments or did not see that learning was relevant to them. Others lacked confidence in their ability to learn.

Of those who did participate, 94 per cent stated that they would like to continue learning and would prefer opportunities to be available at work, though not necessarily in their worktime. A good proportion, however, subsequently went on to join local evening classes or continued to attend the open learning centre in a combination of worktime and their own time.

According to project leaders, employees were motivated to continue learning because their new experience of learning was a good one:

> *Participants are very anxious at first. For many it is their first experience of formal education since leaving school. Many undervalued their own skills and abilities. But after a few sessions they begin to enjoy the experience.*

To maintain the momentum created by the pilot project, a number of strategies were put in place to help employees continue their learning. These included:

- a weekly open learning workshop to enable staff to continue learning where their programme left off
- ongoing outreach work to promote the new facility and meet further needs
- provision of information on free or subsidised local courses
- development of basic skills training materials to meet particular work-related needs
- a review of the 'readability' of company paperwork
- training of a staff member to support employees' learning.

The overwhelming success of the scheme was attributed to three principal factors:

- *The commitment of managers* (their encouragement to employees was seen as essential).
- *Literacy and numeracy skills were linked to work skills* and the project was presented as training rather than education.
- *The initial training was offered in paid time and at the place of work.* 'What's so good about this is that it's in worktime otherwise I'd never be able to do it.'

The project was seen to have benefits for the organisation as well as for individual workers. Managers found that training really benefited staff and increased their motivation, although some reported problems with finding adequate cover while staff were learning.

(Source: Oxford Basic Skills Unit, (1996)
Essential Skills Training Pilot Project for Residential Services Staff,
Oxford Brookes University Final Report)

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Lancaster Employee Development Consortium offered two free courses 'Put Yourself Forward' and 'Can't Spell for Toffee' to nursing assistants at the Moor Hospital in January 1997. Full-time workers got release to attend and those working part-time received an allowance to attend. The aims of the courses were to increase confidence, to present oneself better, to develop writing skills, to enhance job prospects and to encourage students to consider new challenges.

(Source: Workplace Basic Skills Training Network, 1996, Lancaster University)

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Equal Opportunities Initiatives

To achieve greater equality in the workplace, a components manufacturer in Birmingham initiated a more comprehensive approach to recruitment and training. This involved new procedures for recruitment and selection, promotion and appraisal; skills audits and identification of training needs of all staff; the introduction of special workshops for staff at all levels and women-only training for key individuals.

The new approach paid dividends: the company made greater progress towards gaining the Investors In People award and staff management skills were enhanced. The training also helped the company to implement a shift from individual piecework towards cellular manufacturing. Process improvement teams were set up to identify and recommend changes in order to achieve quality. The positive contribution of female staff quickly became evident and 'one of the most successful process improvement teams to date has been an all-women team which identified improvements saving the company many thousands of pounds'.

(Source: Birmingham TEC, (1996) *The Business Case for Equal Opportunity Development*,
the report of a project with three Birmingham employers commissioned from
Potential Unlimited Training and Human Resources Consultants)

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In-House Learning Centres

When the Managing Director of *Appleyard*, a small Peugeot dealership in Chesterfield, discovered that only about half of the 55 employees knew how to find out about training and development opportunities, he created the Appleyard Learning and Education Centre (ALEC) with the support of the local TEC. The centre offers information and guidance and has mounted a wide range of accessible learning opportunities in response to employee learning needs. These include foundation learning and learning for alternative careers as well as courses in basic education, information technology, driving, foreign languages, electronics, sports and management training. ALEC also helps employees to explore the possibility of obtaining qualifications, ranging from NVQs to degrees.

Offering this mix has produced gains for the company as well as for employees:

> *Appleyard has pushed non-academic pursuits as strongly as formal qualifications. Improved inter-personal skills, increased staff morale and motivation as well as the flexibility to accept change, all help the company to stay ahead of the competition by improving levels of customer care.*

Since ALEC started the company has become one of the most successful Peugeot dealerships in the UK. Peugeot chose Chesterfield for its first Express Fit Exhaust and Tyre centre in Europe and the learning/multi-skilling environment helped to boost sales 34 per cent above budget. In 1993 Appleyard was the winner of the National Award for New Learning Opportunities.

In a presentation to a conference in 1997, the former Managing Director claimed that offering learning opportunities focused on personal development and fulfilment has had an 'amazing' impact on business performance:

> *Creating a learning environment of this kind involves the ability to champion the development of a whole process where everybody can grow and have their value appreciated.*

(Sources: Sunday Times, 11 June 1995 and Frank Lord, Director of MITAC and North Derbyshire TEC at the NIACE 'Widening Participation in the Workplace' Conference, Birmingham, 10 March 1997).

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Local Learning/Training Centres which can be used by Employers and Individuals

A new manufacturing training centre – the Waterton Training Centre – has been opened in Bridgend, jointly funded by Ford, the Welsh Development Agency and Mid and South Glamorgan Training and Enterprise Councils. It will be run by staff from Swindon College and will offer state-of-the-art manufacturing training for Ford and other businesses across South Wales. The centre will enable SMEs in the region to provide their employees with skills and qualificatrions.

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With the help of Workbase Consultancy and funding from the Economic Development and Grants Office of Wandsworth Council and AZTEC, the London Borough of Lambeth has set up a flexible learning centre which offers training opportunities for employees, and retraining and employment openings for the unemployed. Individuals using the centre can gain free advice and tuition. They can choose their own method of learning, the hours they attend and the range of work they undertake. They can take part in specific courses or work on their own, using specially designed materials, towards gaining qualifications and improving their work-related skills.

Local employers can book the centre for their own use or ask staff to develop or assist their own training. They are offered a free consultancy including an analysis of their company skill needs. The centre also offers customised courses developed around specific work requirements.

Within four months of opening, nine businesses had used the facilities and a large number of individuals had studied there. Local employers had used the centre to train their employees in areas such as communication skills, customer care, telephone skills, form filling, metrical conversion calculations, report writing and interview skills.

(Source: Workbase, London, undated)

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Learning World at Gateshead Metro Shopping Centre is the result of a partnership between the University of Sunderland and Gateshead College. It has a range of facilities for individual, group and employers use and offers courses ranging from computer literacy to MBAs. It is open six days a week from early in the morning until late at night.

The Executive Learning Club provides seminars and specially designed programmes for junior and middle managers. The centre has been found to be particulary useful for small retail businesses.

(Source: Hillman, J., (1996) *University for Industry: creating a national learning network*, IPPR.)

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Learning Networks

With the help of European 'Adapt' funding, Hertfordshire TEC has created a learning network particularly to provide SMEs and their employees with: 'a low risk/low cost platform to share and explore learning opportunities in a highly challenging yet safe environment'.

Subscribers to the network can access a complete range of learning opportunities including a self-managed learning route for which they have the use of the TEC's Learning Resource Centre containing up-to-date learning resources in the form of printed materials, videos and computer-based facilities such as e-mail, the Internet and CD-Roms.

The Network also provides group learning activities – practical workshops, learning forums and larger group events as well as opportunities for one-to-one learning from experienced TEC or other advisors who act as learning mentors.

Since it was launched in the summer of 1996, the Learning Organisation Network (LON) has outstripped expectations. Through it about 170 smaller organisations have been able to access low-cost and sometimes free learning resources and support. In March 1997, there were about 50 LON subscribers and a number of other networks had developed from activities such as the Learning Forum and the Mentors' Forum:

> *Our clients tell us that their business and personal objectives are being fulfilled and that real change is occurring as a result of our intervention. We are now offering self-managed learning resources, group learning activities and one-to-one advisory support to enable SMEs in particular to address the challenge of sustainability.*

Clients have a say in how activities develop and they have requested sessions on a number of topics such as developing a learning culture, managing a learning environment, sharing models of good practice, setting up open learning centres, career development in the workplace and making links between Investors in People and the Learning Organisation.

(Source: Hertfordshire TEC)

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Collaborative Approaches to Training

Learning Link was a two-year project (1995–1997) in the North East aimed at individuals and small and medium-sized enterprises. It was supported by a partnership of 17 education and training providers and government agencies and funded by Stockton-Thornaby Task Force, City Challenge, Teesside TEC and Stockton and Billington College of Further Education.

The aim of the project was to increase achievement and improve the skill levels of employed Stockton residents, especially those with few or no vocational qualifications. To achieve this goal, the project set up a 'Weekend College' for local employees. This offered free vocational training up to NVQ Level 2 in seven centres. Individuals attending the centres could follow courses in information technology, business and administration, engineering, catering, health and safety, communication skills, counselling, care of the elderly and return to learn. Students living in Stockton City Challenge and Stockton-Thornaby Task Force areas were also eligible to have their examination fees paid.

The project provided free advice and support services to 50 SMEs in each year of its operation. They were helped to identify training needs and draft specific training action plans.

Employers in the Stockton City Challenge and Stockton-Thornaby Task Force areas were also helped to set up systems for workplace accreditation via National Vocational Qualifications and Teesside Open College Network.

(Source: Learning Link Project, The Weekend College, c/o Stockton and Billington College of Further Education, Oxbridge Avenue, Stockton-on-Tees, Cleveland TS18 4QA)

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A European-funded project in Dublin adopted a joint approach to training and development. The project involved six small contract cleaning companies, their employees and a major trade union.

One hundred and fifty women employees, many working part-time, took part in the project. They included managers, shop stewards, supervisors and cleaners. They were organised into two training groups where they were encouraged to contribute ideas and learn from each other on new ways of working and working relations, the application of new skills and shared learning.

As a result of these training sessions, participants became more confident: they felt more valued and were prepared to play a more significant role in their respective companies. Evaluation showed that the project brought about cultural and organisational change at both company and industry level. The style of industrial relations shifted from the traditional adversarial approach to team-building and joint problem-solving, with managers and workers holding each other in mutual respect.

(Source: Rees, T., (1995) *The Axia Project*, Colloquium report,
School for Advanced Urban Studies, University of Bristol)

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Shared training facilities

Glaxo has been offering the spare capacity in its training centre to other companies to use for apprentice training. Spare places are managed by a local charity which is also a training organisation. Glaxo also provides equipment and trainers to a wide variety of small firms in the belief that its role on the local community goes beyond just providing jobs in its own plant

(Source: CBI 1996 and Norfolk and Waveney TEC, 1995)

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Supply chain relationships

Some SMEs have identified benefits from long-term supply chain relationships. In certain cases such relationships have led to a partnership of support in which the supplying company has become a collaborator in providing expertise, information and support in selling products on to its customers. Some supply companies also provide their customers with training in the use and servicing of their products.

(Source: Lane, (Ed.) 1994)

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Employee Development (ED) schemes for smaller enterprises

Employee development schemes frequently involve partnerships between employers, unions, employees, local TECs and other education and training providers.

One example is the Derbyshire Employee Development Initiative (DEDI), which involves a partnership between the residential adult college (Northern College), the Local Education Authority, and the local TEC.

Another example is an employee development consortium of SMEs which has been operating in Nottinghamshire since 1995. Although businesses run their own in-company schemes, collaboration has enabled them and their employees to share experience and, sometimes, learning activities; to pool expertise and knowledge of workplace learning practice; to provide peer support to the companies involved; to share information about suppliers; to create economies of scale in the delivery of workplace learning and provide case study information.

A third example is a national development project, funded by the DFEE, which involves four TECs in South Yorkshire and the East Midlands and nine education and training providers from further and higher education. Each of the providers is producing a strategy on Employee Development which links to their wider purposes and considers what will be required and how they can respond through the development of internal capability and networking. In each case the strategy will be tested with local employers and their workforces. The providers will then help organisations to set up and run employee development schemes.

In 1996 about 30 TECs were running employee development schemes.

Kent TEC set up its small firms employee development model, the 'Return to Learn Employee Development Scheme', in 1994. The TEC contributes £25 per employee per course and it is overseen by a peripatetic facilitator. Participants in the scheme have taken courses in information technology for the terrified, foreign languages, first aid, car maintenance and basic skills.

The following are key features of the scheme:

- typically isolated learners are brought together e.g. from companies with just two or three employees
- employees choose the curriculum
- times are tailored to help workers attend (e.g. at the end of shifts)

- courses are often set up in business parks, bringing learners from different companies together
- courses are of short duration – typically six weeks
- recognition and rewards are available in the form of certificates of achievement.

Although the concrete returns are hard to identify and measure, about half of the 54 managers involved reported that participating employees had increased motivation and self-confidence and a significant number believed there was an improved atmosphere at work, with better relations between employers and workers.

Other benefits have been identified as follows:

- workers take greater responsibility for their own learning
- the scheme has enabled companies to demonstrate their appreciation of their employees
- there has been improved staff motivation and lower staff turnover.

The TEC recommends others to establish similar schemes, suggesting that they should initially do so on a small scale. It also suggests linking it with business objectives and adopting a sectoral approach.

(Sources: Kent TEC, *Employee Development Schemes: a contribution to national prosperity*,
East Midlands Conference Centre, Nottingham 16 March 1995, DoE Moorfoot;
DfEE, 1996, *Employee Development Schemes: what impact do they have?*;
University of Leeds, 1993, *Adult Learners at Work*, Final Research Report,
Department of Adult Continuing Education)

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Help With Financing Training

The National Westminster Bank has been leading a scheme offering small businesses discounted finance in exchange for taking courses in financial management. The pilot scheme was mounted in Norfolk after a joint study by the bank and Norfolk and Waveney TEC of small business failure. The Norfolk Small Business Initiative offers borrowers a one per cent discount on business overdrafts or a cash refund of £150 per year for three years in return for taking a five-session course in financial management skills at City College. It was intended that this scheme would be extended to other parts of the country if a clear link between training and improved business finance could be established.

(Source: CBI, (1996) *Realising the Vision: a skills passport*)

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Skills Challenge Training Projects

A pilot scheme for employers has been initiated under the Skills Challenge initiative (see Section 9) by the North West Training Council. The initiative aims to help participating firms develop a process that they can immediately implement and which in the medium to long term will enable them to anticipate, plan for and satisfy their skills training needs. The process involves a number of stages:

- determining skill needs from operational plans and employee development programmes
- specifying training needs
- selecting and finding skills training
- designing training
- conducting training, evaluation and record-keeping.

Participants are expected to adapt and implement the process within six months, making sure that it fits in with their individual business and operational plans, human resource policies, business systems and general management needs. They are then expected to conduct skills training provided by themselves, the North West Training Council or external specialists. Special seminars are organised for managers to address the practical problems that individual firms may encounter.

By the end of December 1996, participants were adapting and using the process in a variety of ways: in working towards the Investors in People award; in multi-skilling staff; in cross-training maintenance staff and determining supervisory skill needs.

The scheme places an emphasis on group working and this encouraged the participants to collaborate in their training efforts:

> *It is our ultimate objective that the co-operation generated and its benefits will outlast the scheme, for the long-term prosperity of all the participating organisations.*

(Source: Wilson, B. and Forsyth, S., (1996–97) 'The Skills Challenge: managing and training skills in SMEs', *Training Tomorrow*, Vol. 10, No. 9, Dec–Jan, 17–18)

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Another Skills Challenge training project has been taking place in 12 Asian restaurants in London. Initiated by the Hotel and Catering Training Company, the aim was to fill skills shortages in the industry by providing a structured form of training to the Bangladeshi Caterers Association (BCA). The BCA has been training the 12 restaurant owner/managers to develop and deliver training plans for their own restaurants; to develop an NVQ infrastructure to deliver training and accreditation for Association members' staff and to develop a model programme of good practice to be used across the UK (the Hospitality Training Foundation Tel: 0181 579 2400).

(Source: *Training Tomorrow*, Vol. 10, No. 9, Dec 1996–January 1997)

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Open and Distance Learning

In 1994, the Open University acquired Round 1 Single Regeneration Budget (SRB) funds to develop new approaches to the provision and support of open learning-based vocational training, in partnership with Cornwall, Devon and Somerset County Councils, Devon and Cornwall TEC, the Rural Development Commission, the West Country Tourist Board and the West Country Development Corporation.

The scheme was targeted at people who had difficulty in participating because of their rural location or disability; people disadvantaged in the labour market; people employed or seeking employment in SMEs and those working in the voluntary sector in the areas of social and economic regeneration.

The aim was to provide open and flexible vocational and professional training programmes in the South West that would respond to local training needs and contribute to economic regeneration. The programmes organised to date include training in sustainable tourism; business French; environmental conservation and management; managing voluntary and non-profit enterprises; training GPs as trainers.

The programmes have demonstrated the advantages of flexible, open learning-based training to those who would have found it difficult to obtain appropriate training at suitable times and in accessible locations.

(Source: Reeves, B., (1996–97) Open Learning for Rural Skills, *Labour Market Review*, Vol. 0, Issue 0, Winter, pp30–31)

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Support for Open Learners

Many employees are now expected to manage their own learning and self-development, and for some this takes the form of open and distance learning. However, a common problem suffered by people who learn in this way is a feeling of isolation. To counter this, the Open College has launched a range of Internet/Intranet services designed to encourage learners to interact with one another, exchange information and ideas, discuss course work and problems with tutors and participate in on-line discussion groups. They can also transfer completed assignments down the line direct to tutors via e-mail.

Access to this service is possible from any on-line PC and those without one can use the increasing number of public access points in public libraries, educational institutions and Cybercafes.

Once registered, each student is allocated a user name and password. Then they can develop a 'Personal Electronic Workbench' which provides access to a range of training courses, learning materials and tutor support.

There are currently four on-line management programmes including Certificates in Team Leadership and First Level Management, and the Post Graduate Certificate and Diploma in Management. These are accredited by the University of Oxford Delegacy for Local Examinations and the Institute of Supervisory Management.

The main attractions of this interactive learning technology are that learners are at the centre of the whole process and because of its flexibility, can log on to resources at times appropriate to them as well as communicate with tutors 24 hours a day. Because they can communicate with fellow learners, there is also a degree of participation regardless of where learners live or study.

The technology can also be used by companies. With its partner, Telematica, the Open College can develop Intranet systems running internally within an organisation, allowing offices in different locations to run training courses in parallel. Thus an in-house training function can be made to operate across an existing IT infrastucture.

(Source: *Training Tomorrow*, Vol. 11, No. 3, May 1997)

9

Sources of Help and Advice for SMEs and their Workers

SMEs wanting to improve their internal training provision and knowledge of external providers can turn for assistance to local TECs, local Business Links, further education colleges, universities, Industrial Training Organisations, local authorities, Economic Development Units, private consultancies and, sometimes, larger companies.

There are also a number of government initiatives designed to assist SMEs in improving their training efforts. Details of these are available from local TECs.

Government Initiatives

(NB At the time of writing it was not clear to what extent some of the initiatives listed below would be retained by the incoming Labour government.)

- *Help for small firms*
  The Small Firms and Business Links division of the Department of Trade and Industry produces free booklets to help SMEs survive and grow. (Available from DTI publications, Admail 528, London SW1W 8YT.)
- *Skills for small businesses*
  This initiative was introduced in 1995 to improve the capacity of small firms (with less than 50 employees) to develop their workforces by identifying and developing key workers as 'training champions'. These individuals are expected to lead the development and implementation of their firms' training plans. They receive support to develop training and assessment skills and update their own managerial or technical skills through the structured approach offered by NVQs.
- *The Skills Challenge Training Initiative*
  This was launched in August 1995 by the Department for Education and Employment and the Department of Trade and Industry. The initiative has two principal objectives: to encourage small and medium-sized enterprises to develop their existing skills base, enabling them to keep up with the demands of their individual marketplace; and to encourage smaller firms to work together in groups, pooling experiences and devising jointly acceptable solutions to enable them to overcome the barriers to training that hinder economic success.

  Finance for the scheme has been provided through a £5 million prize fund. The scheme rewards the best ideas involving 10 or more companies. There is scope for larger firms to help smaller ones, although the focus remains on those with less than 50 employees.

  (Some examples of Skills Challenge initiatives are included in Section 8.)

- *The Small Firms Training Loans (SFTL) scheme*
  This was introduced in 1994 to help smaller businesses to raise the capital they need for investment in training. The scheme involves individuals in decisions about their training, and loan charges can be met jointly by them and their employer.
- *Career Development Loans*
  These are available from banks to help individuals finance their own vocational training. Details are available from TECs and from the DfEE, Steel House, Tothill Street, London SW1 9NH.
- *Vocational Training Relief (VTR)*
  Since 1992, tax relief has been available to individuals who finance their own vocational training leading to NVQs and to those aged over 30 engaged in any full-time vocational training lasting up to one year, whether or not it is related to NVQs.

  In November 1996, the then Chancellor proposed an extension of this scheme to cover training financed by Career Development Loans and Access funding. In addition, individuals are exempted from tax on the benefit of employer-funded training, including non-job-related training of the type offered by Employee Development Schemes.
- *Innovation in Training Initiative*
  The DFEE has been running a flexible training strategies programme specifically for TECs, to help them examine the business case for flexible training methods and develop and implement plans for their own use and promotion. The initiative also monitors and assesses research developments and good practice in technology in training, and disseminates information to bodies such as TECs, ITOs and Business Links which advise employers and training suppliers.

  Information from: John Rodger, MD, York Consulting, St Paul's House, Park Square, Leeds LS1 2PJ. Tel: 0113 234 1400, fax: 0113 244 1452.
- *Modern Apprenticeships*
  The Modern Apprentices scheme which has replaced the Youth Training scheme is administered by TECs with government funding. It enables companies to train young people as apprentices at far less cost than usual workplace training. Currently available in over 50 industry sectors, the scheme encourages employers to provide training leading to nationally recognised qualifications at NVQ Level 3 or above. The main target group is 16- and 17-year-old school and college leavers although it is also available for 18–24-year-olds.

  Some TECs report that the take up of the scheme has been greatest among SMEs, particularly in the retail and distribution sector where the majority of companies taking advantage of the scheme have been smaller businesses.

- *Financial help for SMEs wishing to achieve Investors in People status*
  A new sum of £500,000 has been made available to 12 TECs by the Government to assist small firms achieve 'Investors in People' status. The funds will be used to run development projects with small local firms.

The University for Industry (UfI)

This new initiative planned by the Labour Government is not a university in the conventional sense but involves the establishment of a national learning network which will enable learning to take place in the home, the workplace and public places such as libraries and community centres, facilitated by open learning materials.

The UfI will commission education and training providers and employers to supply good quality learning materials in the form of audio and video cassettes, CD-Roms and printed materials. It will also provide support and information, a telephone helpline and an information and guidance database. Industry will be involved in identifying and anticipating skills needs and establishing flagship programmes.

By removing learning from the constraints of institutions and pre-packaged courses, the UfI aims to help a greater number of people to participate, particularly those groups who have traditionally been under-represented.

The scheme will start by targeting workers in small organisations, encouraging them to make greater use of the workplace for learning and helping them to access learning facilities. The UfI will also commission workplace study programmes to improve workers' skills at low cost. Learners will be assisted in working towards existing national qualifications and assessment. They will be offered guidance and a personalised learning route, an individual learning plan and a record of achievement.

Training and Enterprise Councils (TECs)

TECs are independent companies with a majority of directors from private sector businesses which contract with the Department for Education and Employment to provide a range of services in their localities which promote training and enterprise. Responsibility for TECs in Wales lies with the Secretary of State for Wales. Chief among TEC concerns in terms of budget is the planning and management of youth training and training opportunities for unemployed adults. TECs are, however, not confined to these activities. Each TEC has its own corporate plan based on local labour market conditions and priorities.

The Consortium of Rural TECs (CORT) is a voluntary association of TECs concerned with the promotion of training, enterprise and economic development in rural areas. CORT offers a range of services to its member TECs.

TECs can provide training programmes and advice on training as well as facilitate employer access to grants and finance that SMEs might not otherwise know about or receive. A number also have small business units which offer specific assistance and advice to small organisations.

There are a number of other ways in which TECs (or LECs in Scotland) can help small businesses train their workforce. They can:

- facilitate, pump-prime and support employer learning networks
- form links with local colleges and other training providers to explore the possibility of offering training assistance to smaller firms
- help companies liaise with training providers
- co-ordinate local Employee Development schemes
- set up a forum for the concerns of small businesses
- encourage and facilitate group training schemes to meet the needs of specific sectors and to enable firms to share the costs of training
- liaise with industrial training organisations in the setting up of special interest group schemes
- advise small business managers on available training and provide some measure of their quality
- encourage providers to deliver training in ways that are accessible to small companies and allow for their budgetary and time constraints
- develop support systems for small firms in-house training activities, e.g. by employing a small business training liaison officer to give advice, information and support on training to smaller firms
- mount awareness campaigns to persuade small business owners/managers of the benefits of training and inform them about sources of help and provision
- adopt a brokering role in assisting co-operation between large and small firms in sharing training facilities
- support adult guidance centres (Employment Department, 1992).

The local dimension of TECs means that they can respond quickly to local company queries and needs. Some have collaborated with other enterprise services to create 'one-stop shops' and business growth centres where a full range of training and enterprise services and conference facilities are available to employers of different sizes.

Many TECs have found that contacting small employers is difficult. According to one contacted during this project: 'interesting a small business which has no training or quality orientation in training and enterprise messages is an uphill task'. Those which have been contacted, however, have generally welcomed TEC assistance in areas such as computer training, updating on new technology, employment and health and safety legislation, supervisory and management training, information and advice on quality standards and access to grants and loans (Crowley-Bainton, 1993).

Business Links

Local Business Links were established to provide a one-stop shop for business support. They can help firms determine what kind of support they need and provide a tailored package to enable them to obtain specialised help.

Business Link Support Network for SMEs, Tel: 0800 500 200.

Training Access Points (TAPs)

TAP is a network which draws on a database of available training provision for companies and individuals.

Moorfoot, Sheffield S1 4PQ, Tel: 0114 259 7347.

Further Education Colleges

Many further education colleges have services and facilities specifically to assist local companies. For example, GLOSCAT (Gloucester College of Arts and Technology) has a new regional Business Technology Centre which provides:

- training and advice based on an initial training needs analysis
- access to IT facilities including electronic publishing and design, design prototype production, e-mail and other Internet services
- exhibition facilities
- direct training in digital technology
- facilities to increase the take-up of higher level training to NVQ levels 3 and 4
- encouragement for the long-term growth of SMEs by providing help with developing their competitiveness.

The emphasis is on flexible training and support to meet individual learning needs.

The centre is open between the hours of 9.00 am and 9.00 pm most weeks of the year and also at weekends if necessary. It has already provided a large number of companies of all sizes with basic training and the use of computer-aided design and manufacturing facilities:

> *By using our small-scale production facilities, clients can manufacture a prototype and check it against their design specification. Once they have proved that the prototype is satisfactory they can take their design, saved on a disc, to a company which specialises in mass production* (Source: *Insight*, Spring 1997, pp24–45).

Other Companies

Some companies recognise that the skills and learning of their suppliers are increasingly important to the quality of their operations. 'Partnership sourcing' is a means whereby larger companies encourage investment in training among the smaller businesses in their supply chains.

In some areas there are local Small Business Clubs which enable small employers or self-employed people to share ideas and experience. Local Chambers of Commerce can supply details.

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New Technology and Multimedia Products

- The Basic Skills Agency (Commonwealth House, 1–19 New Oxford Street, London WC1A 1NU, Tel: 0171 405 4017) has produced a CD-Rom called *The New Reading Disc*. It helps the development of reading, writing and spelling skills in a range of contexts and includes writing letters and basic skills in the workplace. It can be used by individuals and can be included in accreditation schemes such as City and Guilds Wordpower.
- In collaboration with other agencies, IBM have developed CD-Rom training materials for NVQs, including customer service, business administration and using IT.

- McMillan Partnership has launched *Learning Works*, a new Internet service which provides instant access to over 6,000 training and education projects.
- The Institute of Personnel and Development operates an on-line Training and Development network. This enables members to discuss training issues on the Internet.
- MARIS On-Line Database has information on open learning materials, tel: 01353 661284.
- Open Learning Directory (listings of open learning materials by subject area), Pergamon, tel: 01865 773315.
- TAPs is a network which draws on a database of available training provision for companies and individuals. Moorfoot, Sheffield S1 4PQ.
  Tel: 01742 597347

Training Packs

Food Hygiene

Oxford City Environmental Health Team and Oxfordshire Basic Skills at Work have produced a training pack which follows the syllabus of the Chartered Institute of Food Hygiene Basic Food Hygiene certificate, but with simplified language to make it more accessible to people for whom English is a second language. There is Open College Network accreditation for the language learning element of the course. Available from Alison Noel, Oxfordshire County Council Basic Skills at Work Team, tel: 01865 778827.

Communication Skills

Oxfordshire County Council Basic Skills at Work Team has produced a training pack (workbooks and trainer's manual) which trains people in verbal skills: speaking clearly, practical listening, tact, self-confidence, appropriate use of company information, telephone skills, adopting the right manner etc. Available from Alison Noel, Oxfordshire County Council Basic Skills at Work Team, tel: 01865 778827.

Telephone skills

British Telecom have produced a training package on using the telephone for people working in voluntary organisations.

Some Useful Addresses

The Basic Skills Agency
Commonwealth House
1–19 New Oxford Street
London WC1A 1NU
Tel: 0171 405 4017,
Fax:: 0171 404 5038.

Business Communications Branch DfEE
Moorfoot, Sheffield S1 4PQ
Tel: 0114 275 3275.

Business in the Community
44 Baker Street
London W1M 1DH
Tel: 0171 224 1600.

Business Links Support Network for SMEs
Tel: 0800 500 200 (see page 84).

The Confederation of British Industry (CBI)
Centre Point
103 New Oxford Street
London WC1A 1DU
Tel: 0171 379 7400.

Equality Exchange
(employer network to share good practice)
Equal Opportunities Commission
Overseas House, Quay Street
Manchester M3 3HN
Tel: 0161 833 9244 Extension 310.

European Social Fund Unit
Department for Education and Employment
Level 1, Caxton House
Tothill Street
London SW1H 9NA
Tel: 0171 273 3000.

Federation of Small Businesses
140 Lower Marsh Street
London SE1 7AE
Tel: 0171 928 927.

Forum of Private Businesses
Ruskin Chambers, Drury Lane
Knutsford
Cheshire WA16 6HA
Tel: 01565 634467/8/9.

Individual Commitment Division DfEE
Room N904, Moorfoot
Sheffield S1 4PQ
Tel: 0114 275 3275.
(Information and advice on employee development schemes.)

Institute of Management
Management House
Cottingham Road
Corby
Northants NN17 1TT
Tel: 1071 407 0580.

Institute of Personnel and Development
IPD House
Camp Road,
London SW19 4UX
Tel: 0181 971 9000 Fax: 0181 263 3333.

Investors in People UK
7–10 Chandos Street
London W1M 9DE
Tel: 0171 467 1900.

Learning Technology Unit
Moorfoot
Sheffield S1 4PQ
Tel: 0114 255 3086.

National Council for Vocational Qualifications
222 Euston Road
London NW1 2BZ
Tel: 0171 387 9898 or 0171 728 1914,
Fax: 0171 387 0978.
(The NCVQ database provides detailed information on all NVQs, listing units, elements and specific performance criteria.)

National Council of Industry Training Organisations (NCITO)
7 Huttles Green
Shepreth near Royston
Herts SGB 6PR
Tel: 0763 263060.

National Extension College
18 Brooklands Avenue
Cambridge CB2 2HN
Tel: 01223 316644.

National Institute of Adult Continuing Education (NIACE)
21 De Montfort Street
Leicester LE1 7GE
Tel: 0116 204 4200
Fax: 0116 285 4514.

New Ways to Work
309 Upper Street
London N1 2TY
Tel: 0171 226 4026.

The Open University
Central Enquiries, PO Box 200
Milton Keynes
MK7 6AA
Tel: 01908 274066.

Scottish Business in the Community
Romano House, 43 Station Road
Corstorphine
Edinburgh EH12 7AF
Tel: 0131 334 9876.

Scottish Trades Unions Congress (STUC)
16 Woodlands Terrace
Glasgow G3 6DF
Tel: 0141 332 4946.

Scottish Vocational Education Council (SCOTVEC)
Hanover House
24 Douglas Street
Glasgow G2 7NQ
Tel: 0141 248 7900.

Trades Union Congress (TUC)
Congress House
Great Russell Street
London WC1B 3LS
Tel: 0171 636 4030
and 5 Claremont Terrace
Glasgow G3 7XT
Tel: 0141 332 8661.

Work/Family Directions UK
24 Gilbert Street
London W1Y 2EQ
Tel: 0171 493 5111.
(Works with employers and employees to create, measure and sustain employee commitment.)

Workplace Basic Skills Training
Network c/o CSET
Lancaster University
Lancaster LA1 4YL
Tel: 01524 592679
Fax: 01524 844788.

TEC National Council
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3 Albert Embankment
London SE1 7SX
Tel: 0171 735 0010 Fax: 0171 735 0090

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Veronica McGivney

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DEVELOP the business

The majority of British workers are employed in small and medium-sized enterprises. The smaller the firm, the fewer the opportunities for staff training and development. However, many do overcome the obstacles and are able to develop their staff, with considerable benefits both for the businesses and the individuals concerned.

This guide is based on recent research and on the first-hand testimony of small business owners, managers and employees, as well as training providers. Aimed at owners or managers of small businesses, this guide is designed to be a basic practical manual for those who want to initiate or improve staff training and development activities but are unsure of how to do it.

Illustrated by case study material, the guide also includes examples of a range of approaches and strategies which can be used to overcome obstacles faced by small and medium-sized enterprises. There are facts and figures about SMEs, flexible working and employer-provided training; a look at specific constraints and difficulties; the business case for training; ideas on motivating employees to participate in training; and an examination of skill needs.

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